



Implementation Guide

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Section I

Introduction

- A. Letter from the Director of DGS
- B. What is eVA
- C. How to Use This Guide



COMMONWEALTH of VIRGINIA

Department of General Services

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January 11, 2001

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Dear Agency Representative,

Technology is creating new opportunities each and every day. Not only is it touching our personal lives, it's simplifying our work. The Commonwealth of Virginia is proud to be part of a technological revolution that has the potential to make procurement easier and faster. I am pleased to announce the future of state procurement - eVA, our new business-to-government Web site.

eVA will streamline and automate government purchasing activities in the Commonwealth beginning March 1, 2001. Developed by the Department of General Services, with assistance from agencies and institutions, the site (<http://www.eVA.state.va.us>) complements the Commonwealth's efforts to harness the power of the Internet through its electronic initiatives. This site will host the most comprehensive Internet e-procurement solution to date. This initiative will empower state agencies to improve their operations and offer many benefits such as:

- Easier and faster purchasing process.
- Less time-consuming administrative tasks associated with purchasing.
- Reduced cost of goods and services through increased competition and leveraged buying power.
- More vendor sources to choose from through central vendor registration.
- Single source for procurement information.
- Improved management decisions through real-time information and visibility of purchases.
- Increased business opportunities for small, women owned, and minority businesses.

Within the next several weeks, Ron Bell, Director of the Division of Purchases and Supply (DPS) and the DPS staff will make contacts. They will discuss your participation in this initiative, and assist you in preparing to use eVA.


I hope you will enjoy this new way of doing business in Virginia. We look forward to working with you as together we change the face of procurement in the Commonwealth!

Sincerely,

A handwritten signature in dark ink, appearing to read "Donald C. Williams", written over a horizontal line.

Donald C. Williams

B. WHAT IS eVA ?

 is Virginia's business-to-government web-based eProcurement tool that opens the door to endless business possibilities. eVA is designed to facilitate, integrate and streamline the entire procurement process from requisitioner to supplier and back. eVA not only provides robust eProcurement functionality to State and Local governments, but also includes features that allow vendors to leverage the power of eCommerce as well.

Underlying the eVA portal is the capability of sharing data (interface/integrate) directly with the ERP-type systems that are the backbone of many organizations. Whether an agency has a comprehensive ERP system or is a paper-based operation, there are key components of eVA that can be leveraged to achieve even more effective purchasing practices.



Users “shop” the eMall for services and goods that are on contract or part of the catalog of an approved supplier. eVA contains the ability to compare “online” vendor prices for similar items as well as track the up-to-the-minute standing of a requisition/purchase request’s approval/status. In addition, data from approved purchases made through eVA may be then used to identify procurement patterns, trends and savings opportunities. It is an easy-to-use, intuitive system that may provide many benefits to your agency and the Commonwealth of Virginia.

eVA is a one-stop shop for goods and services that brings together the power of an internet-based marketplace and state-of-the-art systems in a secure, user-friendly environment. With eVA, agencies have the flexibility to match their unique business needs to the functionality that brings the greatest value.

From the

"shopping cart" experience

to complex procurements

to dynamic workflow approvals

to robust data warehousing

to comprehensive analytical reporting

to real-time data sharing

eVA achieves innovation that will let you break through the traditional procurement paradigm.

American Management Systems

After an extensive and rigorous selection process, the Commonwealth chose American Management Systems, Inc., (AMS) as a partner to deliver the eVA vision. Leading the business-to-government industry with their *buysense* product and service, AMS will provide the eVA functionality in three phases beginning March 1 with the core features and completing by December 1 with advanced capabilities.

C. HOW TO USE THIS GUIDE

This document has been prepared to act as an introduction to the functionality of eVA and to guide your agency through the steps required to become enabled. Each section provides the information, choices and data gathering formats you will need for quick implementation:

Overview	A walkthrough of eVA and your implementation
Getting Setup	Interactive tutorial to prepare your setup in eVA
Ready to Go Live	Final preparations, training, policies and support
Grow Your Use of eVA	Rollout eVA to the rest of your organization and vendors

How to Begin

1. Select an Implementation Leader for your organization.
2. The Implementation Leader should read through all sections of this guide to become familiar with all the tasks.
3. Assemble your implementation team.
4. Using this guide, begin organizing and start gathering the data required for setup.
5. Complete the First Start Data Setup at the beginning of Section III as soon as possible to help streamline your implementation steps.

Once your agency has been scheduled for implementation, an eVA Agency Adoption team will be assigned to bring your organization online. To prepare for this effort, each agency is encouraged to use this Implementation Guide for an early start.

What the Icons Mean

These symbols in the margin mark spots where you should complete a specific task.



Take pen to paper and fill out the form!



Fax the form back to your Agency Adoption Team contact.



E-mail the requested information.



Create a file that will be used to set up data for your agency.

Section II

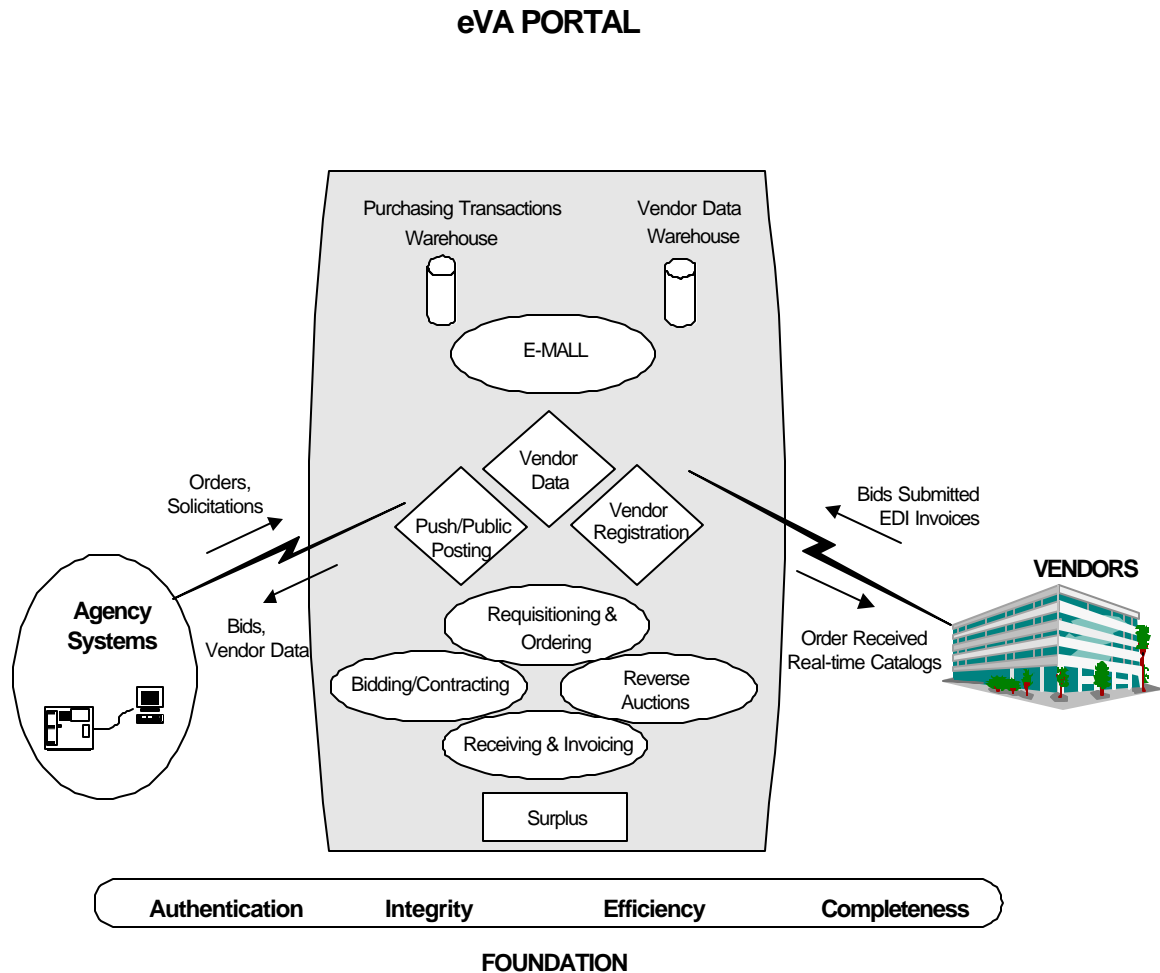
Overview of eVA and Your Implementation

- A. eVA Functional Features
- B. eVA Phased Rollout
- C. Agency Implementation Process
- D. Fees to Participate
- E. Technical Requirements
- F. Training Strategy
- G. eVA & AMS Resources

A. eVA FUNCTIONAL FEATURES

The eVA Portal is the future of procurement for the Commonwealth. Providing not only a comprehensive and secure purchasing environment, the portal also offers the interface, integration and EDI capabilities necessary to improve the entire procurement process from requisition to order, through the supply chain to receiving, and finally to payment. eVA has sufficient flexibility to allow each agency and vendor to determine the most effective way to leverage the available functionality for its own situation and systems. For the first time, a single automated system is capable of establishing standards with a technology that accommodates the specific business needs of individual agencies, including existing ERP systems, and brings the benefits of a common tool and database for the entire Commonwealth.

1. The eVA Model



2. eVA Components Details & Rollout

eVA Core Functionality	Phase I by 3/1/2001
------------------------	---------------------

- **The eVA Portal.** This is the gateway to all eVA services and products through a single sign-on location. It is scaleable and extendable to future eVA functionality.
- **BuysenseOrg.** This is a robust tool that allows each agency to define its own business requirements within eVA. It allows a multi-jurisdictional environment to define individual organizations that may have their own accounting structures, business rules, and workflows.
- **The eMall.** eMall shopping lets eVA users search state contracts and vendor catalogs to find products and services. The eMall supports workflow and approval functions that allow eVA to model each organization's business rules and to distinguish between end user and professional buyers. Order functionality will capture user specific accounting codes, shipping information, and allow for the use of charge card or purchase order numbers.
- **Vendor Registration/Data Warehouse.** This dynamic tool captures vendor registration, bidding, vendor performance, and vendor electronic mail data and uses *push* technology to enable direct delivery of solicitation opportunities. Vendors register through the web, identifying specific products and services they provide via commodity code classes that are easily searched and selected. Vendors also enter their own demographic information and confirm the accuracy of the information as a part of registration, thus increasing the quality of the vendor data.
- **Electronic Posting & Delivery.** Electronic *posting* provides the ability to advertise, post solicitations, awards and other information/documents at the eVA Portal for vendors and public review. Vendors may search this information in a variety of ways, or they may review specific procurement historical data by commodity. Electronic *delivery* (*push* technology) allows vendors to receive solicitations and orders by e-mail or fax based on their registration preferences.
- **Receiving.** Online receiving functionality supports desktop receiving, central receiving, or a combination of the two. Orders may be received by partial line item, by line item, or by the entire order. If an item is rejected, eVA will require a reason for the rejection. Commodity receivers can also be designated.
- **Interface.** The interface utilities provide for importing from and exporting to the application. These utilities can export reference data or transaction based data. Specific import/export data templates will be available in Phase I for:
 - *Vendor bid list export,*
 - *Solicitation import to the VBO (files, not data),*
 - *Solicitation changes import to the VBO (files, not data) and*
 - *Vendor catalog import (for hosting).*

Extended Phase I Functionality

Phase IA by 7/1/2001

- **Quick Quote.** This tool allows users to create an order from existing catalogs or submit a Request for Quotation (RFQ) and receive quote results back. Attachments can be included to allow for detailed pricing or configuration requirements supporting the quote and to provide an audit trail for the bidding process. Once the quote is returned to eVA, the vendor's response data is seamlessly loaded into a requisition for purchasing analysis prior to order submission, approval, and routing.
- **Purchasing Data Warehouse.** The warehouse captures all purchasing transactions and includes standard automated reporting tools that allow execution of customized queries to support operational and strategic decision-making efforts. Additionally, the capability to accept order data from COVA entity ERP systems will allow for the capture of order data processed outside of eVA.
- **Analytical Reporting.** Analytical reporting includes robust reporting tools that allow creation, channeled distribution, and drill down complexity for all data captured in the Purchasing Data Warehouse.
- **Interface.** The import/export data template will be available in Phase I for:
 - *Vendor registration data export (new vs. modified).*

eVA Advanced Functionality




Phase II by 12/1/2001

- **Interface Templates.** These additional interface templates will significantly enhance the use of the portal:
 - *eMall shopping results export,*
 - *Requisition import,*
 - *Solicitation import and export (files and data),*
 - *Solicitation changes import and export (files and data),*
 - *Vendor bid import,*
 - *Solicitation bids/responses export,*
 - *Order data import (for pass through ordering from COVA Entity enterprise systems),*
 - *Order data export (including accounting data),*
 - *Invoice import and export,*
 - *Purchase transaction summary export,*
 - *Receiving data export, and*
 - *Vendor performance data import and export.*
- **Electronic Purchasing.** The electronic purchasing component encompasses the formal procurement process of requisition initiation, solicitation development, bidder lists, bidding, reverse auctions, bid/RFP evaluation, and award. Effective workflow and approval functionality allows each organization's business rules to be modeled. Buyers may specify accounting data, specifications, terms and conditions and any other information specific to the procurement. Vendors may

choose to respond either by submitting an electronic file for import or by keying their response into an online eVA response form.

- **Electronic Invoicing.** Electronic invoicing is supported through electronic payment functionality that allows a vendor to provide an electronic invoice in a prescribed format that includes the invoice number, the purchase order number, and the amount charged. This information is then reconciled to orders placed through eVA, but only for orders that have been received. In the event that the purchase order amounts are different, a reconciliation document is sent to the original purchaser who can utilize a wizard to help identify the difference. Once reconciled, an approvable is created and sent through an approval process. Once that process is complete, an agency can generate an export interface file to send to the corresponding ERP system and/or CARS to initiate payment. Electronic Funds Transfer (EFT) data is maintained at the vendor level and can be transmitted with each payment transaction.
- **Surplus Property.** Surplus Property *redistribution* is supported by importing catalogs of available property into the eMall for direct ordering. *Private sale* of surplus property can be processed either through sealed bid or auction functionality available in the Electronic Purchasing module.

B. eVA PHASED ROLLOUT

		11/01/2000	3/01/2001	7/01/2001	12/01/2001
Phase I	Portal eMall Online Receiving Vendor Registration/Data Warehouse Electronic Posting & Delivery Interface Templates				
Phase IA	Quick Quote Purchasing Data Warehouse Analytical Reporting				
Phase II	Electronic Purchasing Reverse Auctions Surplus Auctions Additional Interfaces Electronic Invoicing Knowledge Center				

C. AGENCY IMPLEMENTATION PROCESS

(What Does an Agency Have to Do to Go Live?)

Starting your agency on eVA is a comprehensive effort that will require your organization to make very specific decisions on configuration, workflow, and functionality. We will begin by setting up each agency's PCard users and professional buyers in a quick rollout so that your agency can understand the basic eVA eMall purchasing model. After this initial rollout, you will be able to re-assess your requisition approval workflow and make additional decisions to allow you to rollout eVA to the rest of the agency.

No matter what choices you make, your eVA Agency Adoption Team will provide the support necessary to ensure your success.

Below is a model schedule that your agency can follow to get your initial set of users online in eVA in 30 days.

GO LIVE IN 30 DAYS!

Prior to Week 1	Orientation Assign Executive Sponsor & Implementation Team Leader Provide initial setup information (user list, top vendors)
Week 1	Review & study the eVA Implementation Guide Assign agency implementation team Kick-off meeting with your eVA Agency Adoption Team Complete First Step Setup tasks
Week 2	Prepare project plan Data collection: users, workflow, accounting codes, roles, vendors Contact your vendors
Week 3	Your Train-the-Trainer training Assess impact on agency policies & procedures Verify collected data Data loaded into eVA (eVA staff) Plan for transition to eVA
Week 4	Train initial users Acceptance testing of agency data and configuration Distribute any new policies/procedures
>>>>	** Go Live **

D. FEES TO PARTICIPATE

(What Fees Will Agencies and Vendors Pay to Use eVA?)

Agencies: There are **no fees** to state government entities to participate in eVA.

Local Gov't: There are **no fees** to local government entities to participate in eVA.

Public Access: There are **no fees** for access to public information on eVA.

Vendors: There are **only** two fees for vendors to participate in eVA: an annual registration fee of \$25 or \$200, and a 1% order transaction fee (capped at \$500 per order).

Optional Services: The Commonwealth has negotiated competitive time and materials rates with AMS that both entities and vendors may use for additional services such as real-time integration with existing systems, complex interfaces, reengineering business processes, or specialized training. Contact your eVA team for more information.

BREAKDOWN OF FEES

Group		Fees	Services Provided
Agencies Higher Education Localities Schools Public Bodies		\$ 0	All functionality of eVA
Public Access		\$ 0	General information: Policies, Manuals Public posting of Solicitations, Award notices, etc.
Vendors	Basic Registration	\$25 annually	In addition to free Public Access: <ul style="list-style-type: none"> • Vendor catalog posting • Electronic order receipt • Online vendor registration • Electronic submission of bids and proposals
	Premium Registration	\$200 annually	In addition to Basic Registration: <ul style="list-style-type: none"> • Push notification of bid opportunities • Analysis/reports of eVA historical procurement data
	Fee per order	1%, max \$500	Vendors pay a transaction fee of the total order value on each order processed through eVA.

E. TECHNICAL REQUIREMENTS

(What Equipment Is Needed to Use eVA?)

To use eVA you only need an internet-connected PC. Here are the technical details:

Equipment	Minimum & Recommended Specifications
Computer	Minimum 32 MB RAM (64-128 MB recommended) Hard Drive: 100-250MB needed by Internet browser.
Web Browser	Standard installation 128-bit encryption (Internet Explorer 5.0 recommended) Required Browser settings: <ul style="list-style-type: none">• Cookies enabled• Java Virtual Machine installed Currently, these browser versions are verified and supported for eVA: <ul style="list-style-type: none">• Internet Explorer 4.0 SP2, 4.01 SP1, 4.51, 5.0 (recommended)• Netscape Navigator 4.08, 4.7.2, 4.7i
Access to the Internet	1. TCP/IP network connection or dial up access (requires modem) 2. Open ports: 80, 443, 465, 1033, 3301, 3304, 3377, 4033, 7733 3. Secure HTTP transactions capable

Do You Need Computers to Implement eVA?

State surplus computers may be available through the Surplus Property section of DGS/DPS. For assistance, contact Mark Bolton (see table below).

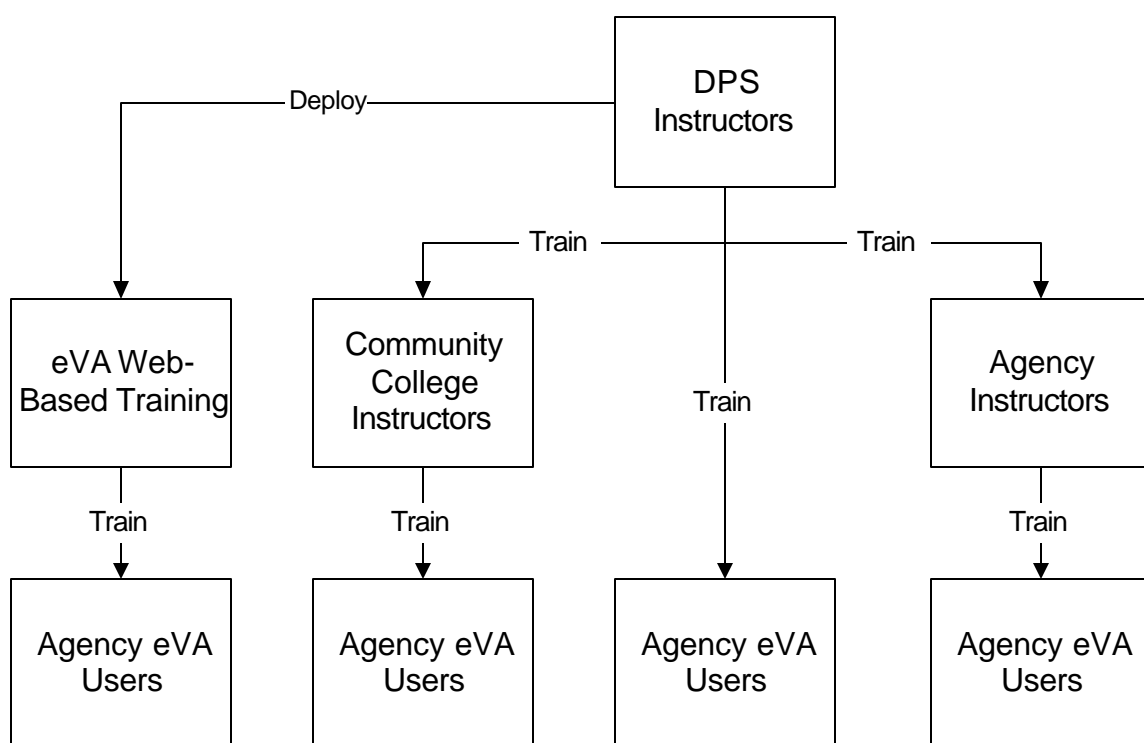
NEED OTHER ASSISTANCE?

Everyone	General	Visit the eVA Portal	www.eVA.state.va.us
Entities/ Agencies	Getting Computers	Mark Bolton	mbolton@dgs.state.va.us 804-236-3675
	Internet Access	Contact your eVA Agency Adoption team	
	Training	Brian Jacobs	bjacobs@dgs.state.va.us 804-786-4634
Vendors	eVA Outreach	eVA Outreach Coordinator	

F. TRAINING STRATEGY

(How Will Users Learn to Use eVA?)

Overall, the training strategy for eVA will be a Train-the-Trainer approach. The DPS training staff will provide assistance in the development of a training plan and will provide instructor training for your training staff. You will identify a training coordinator and a small group of individuals to serve as trainers for your organization. For agencies that do not have a training staff, DPS will assist in arranging training. In some cases, DPS instructors may be available to provide the training. In others, we will coordinate the scheduling of training through the community college system.



eVA Training Model

The approach is to begin initial deployment with hands-on classroom training. Training materials, including PowerPoint presentations and hands-on exercises, have been developed and a self-guided web-based training program is being developed. The self-guided training program will be pilot tested and is expected to become the primary training medium. We expect that most people will be able to learn eVA usage through self-guided web-based instruction.

G. eVA & AMS RESOURCES

(Who Will Help Agencies Go Live?)

Each agency will be assigned an eVA Agency Adoption Team made up of specific DPS and AMS staff to support your eVA implementation. These resources will guide your team through the decisions and learning that will be necessary to set up your agency. Additionally, there will be ongoing eVA training classes and a Customer Care Center (Help Desk) to support all user agencies.

It is important to note that the role of the eVA Agency Adoption Team is to help your team achieve implementation. Since the eVA team will not know your agency's business, your team will bring the internal knowledge and experience required for a quick and effective rollout.

Listed below are the key eVA contacts that have responsibility across the entire implementation effort. These contacts are provided as a quick-reference list that you can call for additional information.

KEY eVA CONTACTS

Agency Adoption Team Leader	Eugene Anderson	eanderson@dgs.state.va.us 804-786-1600
Training Team Leader	Linda Hardwicke	lhawdicke@dgs.state.va.us 804-225-3796
AMS Lead	Nick Namba	Nicholas_Namba@ams.com 804-225-3142
eVA Customer Care	Toll free: E-mail:	1-866-Buysense(866-289-7367) support@buysense.com or through the eVA Portal
eVA Web Address	The eVA Portal	http://www.eva.state.va.us

Section III

Getting Started

- A. Agency Project Checklist
- B. First Step Setup Data
 - 1. Implementation Leader
 - 2. Potential Users
 - 3. Top 25 Vendors
 - 4. Agency Project Resources
 - 5. Current Technical Needs: PCs, Browsers, Internet
 - 6. Agency Systems & Interface Interests
- C. Planning Your Implementation Details
 - 1. Selecting Your Implementation Strategy
 - 2. Setting Up the eVA eMall for Your Agency
 - 3. Understanding Group Profiles
 - 4. Understanding Requisition Data Requirements
 - 5. Understanding Requisition Approval Rules
 - 6. Understanding eVA Receiving Rules
 - 7. Understanding User Profiles and Roles
 - 8. eVA Approval Flow Diagrams
- D. Setting Up with the eVA Data Collector

A. AGENCY PROJECT CHECKLIST

(What Have We Completed, What Still Needs to Be Done?)

Your agency's startup date will be posted on the eVA Agency Implementation Schedule on the eVA Portal site. To help you plan and monitor your implementation work, use the checklist below both as an initial task list and a progress-monitoring tool.



As you start implementation, modify this checklist to show the actual tasks that must be completed.

Agency Name _____

Agency Team Leader _____

As of Date _____

Task	Assigned To	Due	Status	Comment
Assign your Team Leader				
Review the Implementation Guide				
First Step Setup: <ul style="list-style-type: none"> Implementation team Top 25 vendors eVA users Agency systems/ERP 				
Evaluate technical setup: <ul style="list-style-type: none"> PCs Browsers Internet connectivity 				
Select implementation strategy				
Decisions on eVA configuration: <ul style="list-style-type: none"> Requisition fields Workflow Receiving Roles & Permissions Requisition reference data Default values 				
Enter data into eVA Data Collector, deliver to Agency Adoption Team				

eVA staff loads data				
Test loaded configuration/data				
Review & revise agency policies & procedures				
Create Transition Plan				
Create Training Plan				
Identify your trainers				
Schedule Train-the-Trainer class				
Conduct Train-the-Trainer class				
Schedule user training				
Conduct user training				
Contact other vendors				
*** Go Live ***				



Fax this form each week to your Agency Adoption Team Lead _____
at 804-786-5712 to report your progress.

B. FIRST STEP SETUP

(What Should We Do First?)

One thing you can do to “jump start” your implementation is to give us certain data in advance, so that we can streamline your data collection in the next step.

Here is what you can collect in advance and submit to your eVA Agency Adoption Team first:

1. Executive Sponsor & Implementation Leader	Tell us who your team leader will be throughout the eVA implementation.
2. User List	Submit a list of your likely first users by <i>first name, last name, e-mail address, and supervisor</i> . This list will be used to generate a login ID for each person that will already be loaded for you on the data collection tool we bring to you at your first Agency Adoption Team meeting.
3. Top 25 Vendors	Tell us your top 25 vendors. These are the vendors that you have contracts with, that supply high priority items, or that you do the most business with.

There is a second list of data to collect and decisions to make, which you can give to your Adoption Team at your first meeting:

4. Implementation Team	Identify your agency resources that will assist with the eVA implementation.
5. IT Survey	Survey your PCs, browsers, and Internet connectivity for your potential eVA users.
6. Agency Systems	Tell us what other procurement or financial systems (or ERP) your agency uses.

1. *Executive Sponsor and Implementation Leader*

Executive Sponsor

Each agency needs an Executive Sponsor. This is the executive-level decision maker who will follow the overall implementation plan and will work with the eVA Executive Committee on any issues that arise.

The executive sponsor will delegate authority to an implementation leader to carry out the tasks and coordinate the implementation team.

Implementation Leader

The Implementation Leader is the primary point of contact for your organization. The Implementation Leader should have the authority and knowledge to make implementation decisions.

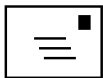
The leader will work closely with the eVA team not only through initial implementation, but also through all future phases of eVA rollout.

As new functionality becomes available in eVA, the sponsor and leader will both work with the eVA Agency Adoption Team to plan, schedule, and implement these future phases.

Initially, the Implementation Leader will need to:

- Find the right people for the Implementation Team
- Coordinate work with the eVA Agency Adoption Team
- Create a project plan for your implementation (see next section)

Tell Us Who! (ASAP)



Tell us who your Executive Sponsor and Implementation Leader are by e-mailing Eugene Anderson at eanderson@dgs.state.va.us and Nick Namba at Nicholas_Namba@ams.com. Or if an Agency Adoption Team Lead has already contacted you, you may respond directly to the team lead.

2. Potential eVA Users



Create a spreadsheet of potential eVA users. Name the file with your agency number and “USERS”, such as “156USERS.XLS.” (A template named 999USERS.XLS will be provided.) As soon as the file is ready, e-mail it to your Agency Adoption team contact.

Focus on the potential users for a controlled start-up. This could include requestors (especially professional buyers & credit card users), approvers, central receivers (if you use central receiving), Accounts Payable viewers, and each of their personnel supervisors.

Include each user’s First Name, Last Name, E-mail address, and Supervisor. The user login will be based on the first letter of the first name and the first 7 letters of the last name. (Numbers are added if the login name already exists.) So if you have a Robert Smith who goes by Bob, you may want to list him as Bob Smith instead of Robert, so that his login name would match the name he is known by.

Anyone listed as a supervisor should also have their own entry. All purchasers and regular users must have supervisors. A few supervisors may not have supervisors of their own; in that case, list “none” for supervisor.

Use the following format The file must be electronic & proofed, so that there are no spelling errors or problems reading handwriting!

First Name	Last Name	E-mail Address	Supervisor

3. Top 25 Vendors

To bring the most value of eVA for your organization, high use and contract vendors should be setup in eVA. Your eVA Agency Adoption Team will help your Implementation Team contact your vendors to invite their participation. The eVA Supplier Adoption Team will then work closely with vendors to establish their online catalogs and coordinate training.



Create a spreadsheet of your top 25 vendors, and name the file with your agency number and the word “VNDRS”, such as “194VNDRS.XLS.” (A template named 999VNDRS.XLS will be provided.) As soon as the file is ready, e-mail it to your Agency Adoption team contact.

The spreadsheet should provide basic information for each vendor as the following table demonstrates. If you buy off of contracts with this vendor, indicate the contract numbers. *There is no need to include statewide contracts.*

Use the following format The file must be electronic & proofed, so that there are no spelling errors or problems reading handwriting!

Priority 1-25	Vendor Name	Address	Contact	Phone	Fax	E-Mail	Contract # (if appl.)	\$ Value or # Orders (est. annual)

4. Agency Resources: Forming Your Team

Each agency will need to provide project resources to work with the eVA Agency Adoption Team on the initial implementation and subsequent rollout of eVA. Primarily, this core set of people will assess the alternatives for implementing eVA, make necessary decisions, provide setup/configuration data, and participate in the training/rollout tasks.

The level of effort for your team is expected to be high over the basic 4-week implementation schedule. Keep in mind that there are several areas of expertise needed; it is unlikely that any single individual can carry out the full responsibility of multiple roles.

Other resources, such as trainers and training facilities, may be identified in your implementation and training plans as the project evolves.

Implementation Team

It is important to identify the right staff to make your implementation successful. The guidelines on the next page will help you identify the types of staff you need. While these individuals should expect to spend substantial time on the project, others in your organization will spend smaller portions of time to support the project by providing information, documentation, and learning to use eVA.

The roles that most agencies will need are listed in the worksheet below and defined in the table on the next page.



Implementation Team Worksheet

List the people on your implementation team and the role that they will have on the project. Include their contact information.

See Roles & Responsibilities on the next page

Role	Name	Phone	E-mail
Purchasing Expert			
IT Expert			
Training Coordinator			
System Administrator			
Business Analyst			
Fiscal Officer			
Security Officer			
Auditor			

IMPLEMENTATION TEAM ROLES & RESPONSIBILITIES

Role	Responsibility
Purchasing Expert	<ul style="list-style-type: none"> ▪ Provide guidance on all agency purchasing issues, policies and procedures. ▪ Must be able to make decisions on key purchasing components such as requisitions and approval flows. ▪ Identify key vendors that are needed in eVA to support agency purchasing. ▪ Help identify requestors, receivers, and approvers.
IT Expert	<ul style="list-style-type: none"> ▪ Assess hardware, software, and connectivity needs. ▪ Analyze interface issues and impact on existing agency systems.
Training Coordinator	<ul style="list-style-type: none"> ▪ Coordinate training requirements (initial & on-going) including needs assessment, scheduling, materials, and facilities.
System Administrator	Primary contact for all system configuration and data maintenance: <ul style="list-style-type: none"> ▪ New users ▪ Reference data updates ▪ Group profile changes ▪ Create/review/distribute agency-wide reports
Business Analyst	<ul style="list-style-type: none"> ▪ Assess workflow and approval requirements. ▪ Help identify requestors, receivers, and approvers. ▪ Coordinate policy/procedure review and updates to incorporate eVA.
Fiscal Officer	<ul style="list-style-type: none"> ▪ Identify business/accounting rules and requirements. ▪ Participate in workflow and accounting data capture decisions. ▪ Assess impact of eVA on Accounts Payable & other financial processes. ▪ Identify Accounts Payable users.
Security Officer	<ul style="list-style-type: none"> ▪ Sign off on the initial setup of agency users ▪ Sign off on all role changes for agency users ▪ Sign off on new additions to agency users
Auditor	<ul style="list-style-type: none"> ▪ Monitor eVA workflow setup and requisition setup to ensure that agency audit needs are met as well as with current procedures ▪ Offer recommendations on changes to improve purchasing workflow while still meeting audit needs

5. Technical Needs: PCs, Browsers, Internet

As noted earlier, there are minimum technical requirements for accessing eVA. This survey will help you identify the various offices/locations in your organization that you intend to use eVA.



Use the eVA PC Checklist to gather the specific configuration information for each user PC. Consolidate all user hardware/software information on the larger table that follows. In each instance where minimum requirements cannot be met, specific plans must be added to your project plan to resolve these issues.

EVA PC CHECKLIST

User Name	
Location	
PC Model/Speed (e.g. Pentium 166)	
Installed Memory (RAM)	__ MB (32 minimum)
Available Hard Drive Memory	__ MB
Internet Browser (brand & version #) <ul style="list-style-type: none">• Netscape 4.03 or higher• Internet Explorer 4 SP2 or higher	<input type="checkbox"/> Netscape, version _____ <input type="checkbox"/> Internet Explorer, version _____
Encryption Level	<input type="checkbox"/> 40-bit <input type="checkbox"/> 128-bit (required)
Cookies enabled?	<input type="checkbox"/> Yes (required) <input type="checkbox"/> No
Java Virtual Machine installed?	<input type="checkbox"/> Yes (required) <input type="checkbox"/> No
Internet Access	<input type="checkbox"/> Modem <input type="checkbox"/> Network

(Use this form to survey the PCs that your future eVA users will be using.)

Office Locations & General Technical Assessment



Summarize your findings here from the eVA PC Checklist. Based on your findings, take steps necessary to ensure that your first eVA users will be able to access eVA.

For each location, please list the following:

- *Location Name*: List a name for each location where you will have eVA users (e.g., Fiscal Services, 8th Street Office Bldg., 3rd floor or Purchasing, Madison Bldg., 8th floor). A full address is not needed.
- *PCs*: List the different types of computers that will be used to access eVA.
- *RAM*: Identify the minimum RAM that is in each computer
- *Internet*: The type of Internet connection at the location (T1, T3, ISDN, 56K Modem)
- *ISP*: Internet Service Provider used, such as DIT, AOL or Direct Connection
- *Browser*: Types of browser & versions used (IE4.3, IE5.0, Netscape 4.2, etc.)
- *E-mail*: E-mail system used (GroupWise, Outlook, Lotus Notes, etc.)

AGENCY TECHNICAL READINESS FOR EVA

Location Name	PCs	RAM	Internet	ISP	Browser	e-Mail
Fiscal Office						
Professional Buyers						

6. Agency Systems & Interface Planning

Future eVA functionality will allow sharing of data between the eVA Purchasing and Vendor Data Warehouses and agency business systems. Information provided on your financial and purchasing systems will help your Agency Adoption Team to advise you on configuration decisions you make that may affect this future functionality.

Identifying Your Agency Systems



Provide the following details about any financial system, ERP, and/or purchasing system(s) that you use at your agency.

- *System Name/Version*: The brand & version number of your system. (e.g., PeopleSoft 7.0, Oracle Financials)
- *Future Date*: If you are planning for a future ERP, indicate the target live date.

System Name/Version	Future Date

Planning for eVA Interfaces

Data sharing will be available with eVA through interface templates. eVA will provide data in standard formats for each type of data. Templates for specific agency systems will not be provided as standard. After completing the initial implementation, agencies can arrange for AMS development resources through time and material task orders to create specialized templates.

Each agency will be responsible for any development work necessary to import or export data with eVA using the standard interface templates.

Use the following checklist to identify the interface points your agency may wish to use.



Extract data from eVA

- ☐ Vendor registration data
- ☐ Vendor bid list export
- ☐ Solicitation data, changes, responses
- ☐ Order data with accounting data
- ☐ Receiving data
- ☐ Purchase transaction summary

Sending data to eVA

- ☐ Historical purchasing data for eVA data warehouse
- ☐ Solicitation data, responses

C. PLANNING YOUR IMPLEMENTATION DETAILS

(How Do We Set Up eVA for Our Needs?)

The rest of your key decisions for setting up your buyers in eVA require you to understand the requisition and workflow process in eVA. You will also learn about the many options available to allow you to customize the eVA workflow and setup for your agency needs.

But first, we suggest that you consider your strategy for rolling out eVA to your agency.

1. **Selecting Your Implementation Strategy**

A Two-Stage Implementation Strategy

For most agencies, we will begin with a core group of users doing basic purchasing tasks, and then add other users and more complicated processes later.

6. For this strategy, we will start with your PCard users and your professional buyers. We will set them up with a basic requisition approval workflow in a test environment for your agency to examine. After trying some sample purchases in the test environment, and providing some further basic data to set up the basic requisition for your agency, we can load your setup data into the eVA production environment for you to begin some actual purchasing.

Start with:

- PCard users
- Professional buyers
- Mandatory source users

7. Next, you will have time to examine in more detail your locations, additional user needs, and your policies and procedures. This is a good time to examine your workflow and your internal policies and procedures, to implement some best practices in your agency, and to revise internal processing steps. We will then follow up with you to add additional users and help you modify your requisition approval workflow to meet your needs.

The All-At-Once Strategy

In a few cases, such as agencies that do not have PCard users and agencies with only a small number of purchasers, it may work best to implement all of your agency users at once. The same general procedures will apply, but more attention will be paid in the first meeting to setting up all of your users at once and establishing an approval workflow to meet your longer-term needs.

Your Agency Adoption Team lead will discuss this option with you if it is appropriate.

2. *Setting Up the eVA eMall for Your Agency*

Background

The eVA eMall is an internet-based shopping cart experience for state agencies and local governments to purchase goods and services. This electronic mall is a service provided through contractual agreement by American Management Systems (AMS). AMS adapted the worldwide Ariba Buyer application to the needs of government creating a tool named Buysense™. The Commonwealth of Virginia's use of this tool is called the eVA eMall.

The eMall allows agencies to make decisions about how the eMall should be set up, or configured, so it will work best for their particular circumstances. Agencies will make decisions on things such as:

- What information should be captured on a requisition
- What the business rules should be for approving requisitions
- How receiving should be handled

Basic eMall Functions

SHOPPING EXPERIENCE

The eVA eMall provides a way for authorized shoppers to search or browse through electronic catalogs and select items to be purchased or key in items not on a catalog. This information is included in an online requisition. Accounting and shipping information may be keyed in or defaulted from information previously set up in the system. The system will build a workflow for requisition approval based on previously defined business rules. The shopper will review the online requisition item, accounting, shipping, and approval flow information, and then submit the requisition to the approval process. The shopper may print a hardcopy of the requisition if they wish, but the requisition information will remain online for inquiry purposes.

APPROVAL FLOW

After the item and accounting information is established for a requisition, the system will build an automated workflow for requisition approval based on previously defined business rules. The user can see a graphic representation of the steps in the approval flow. Users in the approval flow can be notified by e-mail when it is their turn to approve a requisition. Requisitions needing approval will also be found in the person's approval inbox when they log in to the eMall.

PURCHASE ORDER

When the last online approval is made to the requisition, the system creates one purchase order for each vendor on the requisition. The order will be sent electronically if the vendor has registered with the Ariba Commerce Services Network and provided information for sending orders by e-mail, fax server, EDI, or cXML. Otherwise, the purchase order should be printed, then mailed or manually faxed.

RECEIVING

When the order is created, a receiving document "shell" is also created. Based on the agency's business rules, the receiving shell is placed in the receiving in-box of whoever is supposed to officially receive. After all items on a purchase order have been fully received, the purchase order will be closed. Purchase orders that are not expected to be fully received can be closed manually.

INVOICING (possible future functionality)

The eMall tool has the capability of having a vendor send electronic invoices to be automatically matched with the purchase order and receiving. However, at this point, few vendors are capable of sending electronic invoices. This functionality will not be used at this time. As more vendors are able to provide invoice information electronically, considerations will be made whether to incorporate this feature into eVA.

Key Areas for Agency Set Up Options

The eMall can be set up (configured) to make the system most effective for each particular agency. Agencies will learn about the options for configuring the eMall, make decisions, and then gather the data needed for configuration. Agencies will make decisions and gather data for the following key areas:

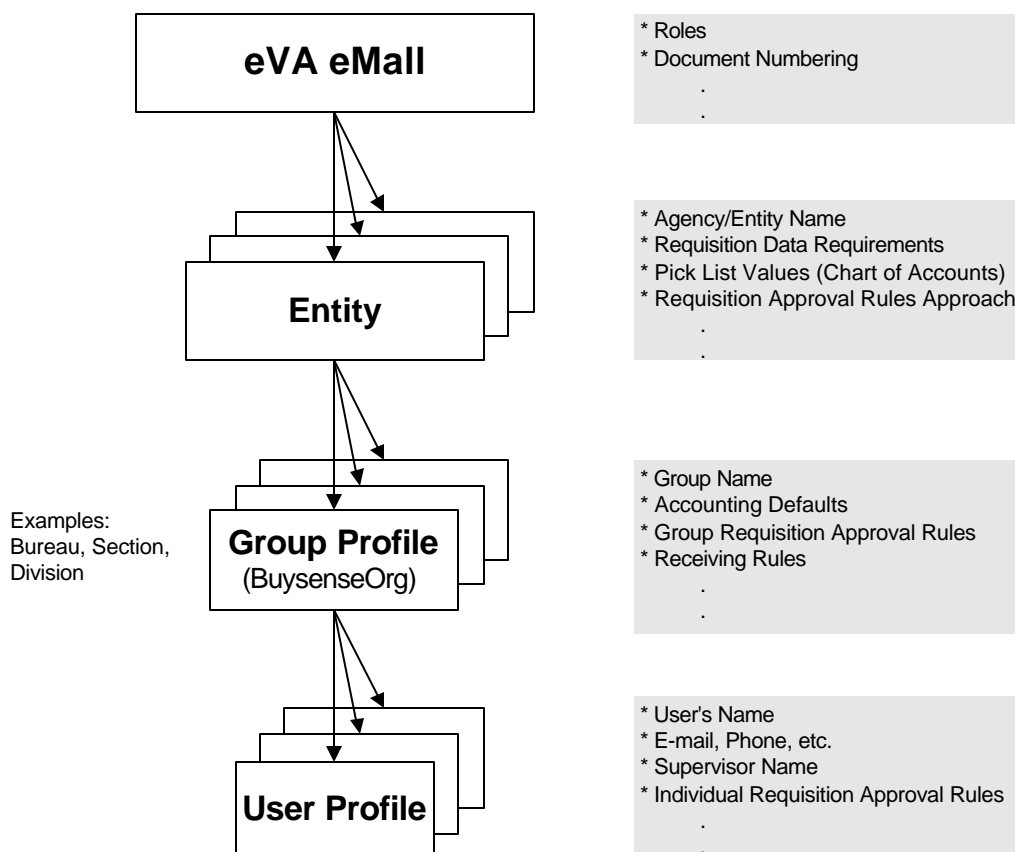
Section	Topic
III-C-2	Group Profiles
III C-3	Requisition Data Requirements
III-C-4	Requisition Approval Rules
III-C-5	Receiving Rules
III-C-6	Users, Roles, and Permissions

Directions on how to proceed with making decisions are covered under different sections of the Implementation Guide

3. Understanding Group Profiles

Different levels in the eVA eMall structure

The eMall configuration decisions are defined at different levels in the system. Explanations for each level follow the illustration.



The **eVA eMall level** is the highest level of the eMall. This is the Commonwealth of Virginia (COVA) level. This level separates the eVA data and access information from other state's information and access.

The **Entity level** is the next level within eVA. An entity can be a Commonwealth agency, an institution of higher education, or a public body as defined by the Code of Virginia. The system allows for an unlimited number of entities.

The **Group Profile level** is a subset of an entity. Think of the group profile in relation to a major work or business unit within an agency. For each unit, the agency may develop a group profile, also known as a buysense org. The group profile distinguishes the business and workflow rules for that group from another group. Each agency must have at least one group profile, but the agency can establish as many group profiles as they want.

The **User Profile level** represents the individual people or system users within a group profile. The user profile will associate the individuals to the group profile they belong to. These users will have a login and password for the eMall. The system allows for an unlimited number of users. Every user who has a login has the capability of creating a requisition.

CONFIGURATION INFORMATION: eVA LEVEL

Roles

Roles define people's access for requisition approval and receiving. Having roles defined at the eVA eMall level allows requisitions to be routed to another entity or agency for approval. For example, an online requisition could be sent to DPS, DIT, or DTP if desired.

A standard naming convention is used to easily identify the agency (entity) in role names. Role names will begin with a prefix (**A** plus agency number for state agencies, **L** plus FIPS code for local governments). For example, all roles for the Department of Health will start with "A601-", such as "A601-Receiving".

Document Numbering

Agencies do not need to make choices for document numbering. Requisition numbers, purchase and delivery order numbers, as well as receiving numbers, are uniquely assigned by the system, across all of eVA, as follows:

Document Type	Alphanumeric Scheme
Requisition	PR followed by a sequential number
Purchase order using purchase card	PCO followed by a sequential number
Delivery Order	DO followed by a sequential number
Receiving	RC followed by a sequential number

Requisition numbers have a prefix of "PR" then a sequential number. For purchase orders made with a purchase card, the order number will have a prefix of "PCO" then be assigned a sequential number. If the order was not made with a purchase card, the order is considered a delivery order and will have a number that starts with "DO" then a sequential number. Receiving has a prefix of "RC" and a sequential number. For example, PR75 could be a requisition for the Virginia State Police and, PR76, could be a requisition for County of Chesterfield. PCO214 could be an order for Department of Information Technology and PC0215 could be an order for Department of Treasury. Similar number assignments are made for delivery orders and receiving documents.

CONFIGURATION INFORMATION: ENTITY (AGENCY) LEVEL

Agency Name

Each agency must assign an entity name. The name must identify whether the entity is an agency or local government ("A" or "L"), include the entity code (agency number for state agencies, FIPS code for local government), the abbreviation and the name of the entity. For example when finished, the complete name should be as indicated below:

A194DGS-Department of General Services

Requisition Data Requirements and Pick List Values

Each entity will make decisions at the entity (agency) level about the requisition data that should be captured. See Requisition Data Requirements for information on how to do this. As part of defining the requisition data, decisions might be made that certain data should be "pick list", text (i.e. free form entry) or checkbox (i.e. yes or no) fields. Pick list fields are those that give a drop-down list of valid values to pick from. These valid values are defined at the entity level. For example, an agency might decide to use the field for Fund, which is defined as a pick-list. In that case, the agency must provide AMS with a list of all the valid fund codes for the agency.

The eMall configuration also provides a feature known as *filtering*. This is a way of setting up edits for valid combinations of values. For instance, an agency may have defined a pick list of valid values for fund code and a pick-list of valid values for cost center. The agency could set up filtering so that only certain cost codes are valid within a given fund code.

General Approach to Requisition Workflow and Receiving

Agencies will make decisions about the general approach they want to take in setting up requisition approval rules. Each agency can choose which of the possible requisition approval steps they will use. See Requisition Approval Rules. Agencies will also determine whether they will use desktop receiving (the requestor does their own receiving) or central receiving (someone other than the requestor does the receiving). See Receiving Rules.

CONFIGURATION INFORMATION: GROUP PROFILE (BuysenseOrg) LEVEL

Agencies must decide how many group profiles to set up for their agency. An agency must have at least one group profile. When deciding how to set up group profiles, the agency should consider how defaults for requisition data, requisition approvals and receiving will be defined.

The agency makes decisions on what requisition data to use (see Requisition Data Requirements). Then defaults for requisition data can be defined at the group profile level. For example, if any agency decides to use fund, cost center, and account fields, they could default the requisition fund code to 0100 and the cost center to 102 for users in Group Profile 1. They could default Group Profile 2 to fund 0200 with cost center 207.

Group Profile 3 could default fund to 0250 with no defaults for cost center. Group Profile 4 could have no defaults.

Some requisition approval rule values are set up at the group profile level and some are set up at the user profile level. See Requisition Approval Rules. The approval dollar amounts and associated approval roles for higher management are set at the group profile. The requisition approval flow may differ for each group profile. For example, the Department of General Services (DGS) decided to set up a group profile for each bureau. The requisition dollar amount that triggers the first higher management approval is the same for everyone in that bureau and the approver is anyone in the bureau chief role. It could be that one bureau uses all three higher management approval options while another bureau only uses two of them.

Receiving rules are also a factor in deciding how to set up group profiles. See Receiving Rules. Using DGS as an example again, DGS will use the central receiving method and the same people will do the receiving (receiving role) for a given group profile (bureau). Another factor could be physical or geographic location for receiving. For example, the accounting defaults and requisition approval rules are the same for everyone in the DGS Bureau of Surplus Property, regardless of physical location. However, it was decided to set up another group profile for Surplus-Wytheville so that a separate receiving role could be associated to that group profile for users located geographically at Wytheville.

CONFIGURATION INFORMATION: USER PROFILE LEVEL

Configurations set up for each user includes the person's name, their login, their e-mail address, phone number, supervisor's name, and individual requisition approval rule data. See Requisition Approval Rules for a detailed explanation.

Users update their own user profiles online. When they do so, the person's supervisor is the first approver of that user profile change. See the eVA Security document for a complete description of the approval process when profile changes are made.

4. *Understanding Requisition Data Requirements*

Key Parts of a Requisition

When you shop in the eMall, the system helps create a requisition that will later be turned into one or more purchase orders. A requisition has a header and one or more item lines. The header has information that pertains to the entire requisition, such as the system assigned requisition number and a requisition title that the shopper assigns.

Each requisition can have as many item lines as you wish. Each item line is for a commodity from one vendor. A requisition can have an item line for one supplier and another item line for a different supplier.

Each item line can have up to 99 accounting lines as needed for appropriate distribution.

Why Make Agency Specific Requisition Data Decisions

There is certain information on a requisition that comes with the system that is a standard part of shopping, such as item description, quantity, amount, etc. The eMall can be set up so that agency specific information can be captured as well. Agencies can make decisions on what data should be kept on a requisition.

This agency requisition information can be used for multiple purposes:

- Online inquiry to the data, which can be useful when preparing to make payment
- Possible interfacing to existing agency systems
- Future reporting from the data warehouse

What Are the Decisions an Agency Can Make?

There are two kinds of requisition data to consider in decision-making:

- COVA-defined requisition data
- Agency-use requisition data

COVA DEFINED REQUISITION DATA

These are data elements that have been defined on how they will be used, their length, and whether they will be a pick list, a text box, or a checkbox. A pick list means that the shopper can click on the down arrow to see a list of choices instead of having to key the data. As part of setting up the system, the agency must provide the data for the list of choices for any pick list the agency decides to use. A text box means the shopper may key whatever data they wish. A checkbox can be clicked on and off.

COVA has predefined several data elements for the requisition header, the item line, and the accounting line. A list of these data elements and their written definitions are documented in the eVA Requisition Template. Fiscal Year and Entity Code are

mandatory. The agency may decide whether or not to use any of the other predefined data elements, but if they are used they must be used according to their definition. If an agency decides to use a certain data element, they can decide whether data is optional for the user or always required, as well as what the actual screen label should be for that agency. For example, an agency may decide to use the data element for Cost Center/Organization/Speed Code and have the screen label displayed as “Cost Code” or whatever term the agency normally uses for that kind of data.

When completing the eVA Requisition Template, if your agency wants to use one of the COVA defined data elements:

- If you want the data element displayed on the screen, enter "Visible" in the column labeled Visible or Hidden.
- If you want to require shoppers to enter data in the field (i.e., they cannot leave it blank), mark the field Mandatory.
- Enter the exact label you want displayed in the column labeled Agency Label.

AGENCY USE REQUISITION DATA

This data is like COVA-defined requisition data, except the agency decides how to use the data elements. In other words, the agency will write the definition. The agency can define several such elements for the header, item line, and accounting line, including pick lists, text boxes and checkbox data elements, displayed vertically on the screen. eVA shows pick list data elements first, then textboxes, then check boxes. The order you enter your data elements in the template defines the order they will be displayed on the screen. The screen will skip data elements not used, so there will not be blank spaces.

The agency can decide which agency use data elements they want to appear on the requisition. For agency use fields, the agency can decide whether the data is optional or always required and what the actual screen label should be.

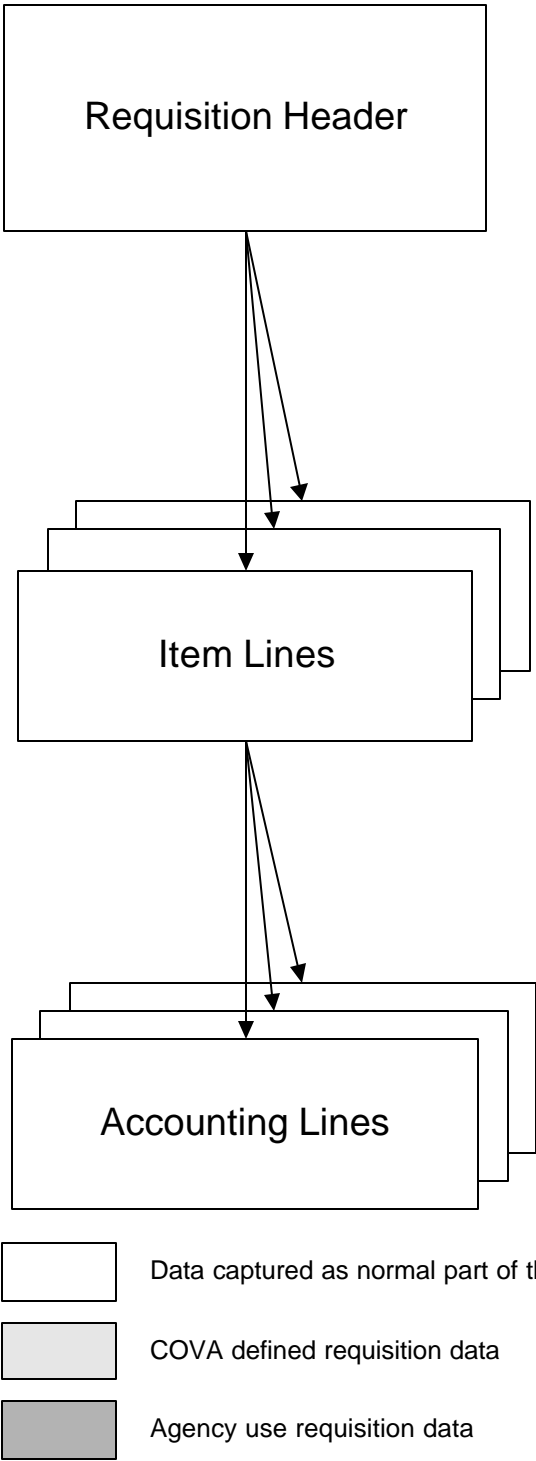
When completing the eVA Requisition Template, if your agency wants to use one of the Agency use data elements:

- If you want the data element displayed on the screen, enter "Visible" in the column labeled Visible or Hidden.
- If you want to require shoppers to enter data in the field (i.e., they cannot leave it blank), mark the field "Mandatory".
- Enter the exact label you want displayed in the column labeled Agency Label.
- In a separate document, write the definition of how your agency will use the data element you are defining.

Requisition Default Data Decisions

The agency can also decide whether to use default values for the COVA defined requisition fields and the agency use requisition fields. These defaults can be set for each group profile (BuysenseOrg).

Requisition Data



Requisition Header Data
Requisition Number
Requisition Title
.
Entity Code
Fiscal Year
Sub-entity Code
Header Cross Reference
ERP Requisition Number
Agency use header data
.

Item Line Data
Item Description
Quantity
Price
Supplier
Commodity Code (UN/SPSC)
.
Item Cross Reference
ERP PO Number
Resale Flag
Agency use item line data
.

Accounting Line Data
Fund Detail
Program/Subprogram/Element
Subobject Code/Account
Cost Center/Org'n/Speed Code
Project
Grant
FIPS Code
Accounting Cross Reference
Agency use accounting line data
.

EVA REQUISITION WORKSHEET

Name	Agency Label	Level (Header, Item Line or Acctg. Line)	Type (Pick list, Text or Checkbox)	Length	Mandatory or Optional	Visible or Hidden
Entity Code		Header	Pick list	10	Mandatory	Visible
Fiscal Year		Header	Pick list	4	Mandatory	Visible
Sub-Entity Code		Header	Pick list	15		
Header Cross Reference		Header	Text	25		
ERP Requisition Number		Header	Text	25		
Item Cross Reference		Item Line	Text	25		
ERP PO Number		Item Line	Text	25		
Resale Flag		Item Line	Checkbox	1		
Fund Detail		Acctg. Line	Pick list	4		
Program/Sub-Program/Element		Acctg. Line	Pick list	7		
Sub-Object/Account		Acctg. Line	Pick list	10		
Cost Center/Organization/Speed Code		Acctg. Line	Pick list	15		
Project		Acctg. Line	Pick list	15		
Grant		Acctg. Line	Pick list	10		
FIPS code		Acctg. Line	Pick list	4		
Accounting Cross Reference		Acctg. Line	Text	25		

Please indicate any additional fields not found above your agency requires. Include the following for each field.

[illegible]

Entity Code	Code that distinguishes an agency or local government at the highest level, such as at the agency code level or local government code level. The coding scheme for agencies is "A" and the agency number, such as A194 for Department of General Services. The coding scheme for localities is "L" and the FIPS code, such as L760 for Richmond. This field is mandatory because it is needed for reporting from the data warehouse.
Fiscal Year	This is based on the Commonwealth of Virginia's standard fiscal year calendar regardless of whether the requisition is for an agency or local government. The Commonwealth's standard fiscal year runs from July 1 through June 30. This value indicates the fiscal year that the requisition is to be encumbered. This is a four-digit year, such as 2001.
Sub-Entity	Used to subdivide an entity code. This may be used to distinguish sub-agencies, school boards, etc.
Header Cross Reference	This is a place for the entity to enter information needed to cross reference the requisition to its own systems or manual procedures.
ERP Requisition Number	This is a place for the entity's financial or Enterprise Resource Planning system to store a requisition number. This is intended for interfacing/integration purposes only.
Item Cross Reference	This is a place for the entity to enter information to cross reference a requisition item to its own systems or manual procedures.
ERP PO Number	This is a place for the entity's financial or Enterprise Resource Planning system to store a Purchase Order number. This is intended for interfacing/integration purposes only.
Resale Flag	Entities that buy goods for resale should use this flag. When data is loaded into the data warehouse, cross walk logic will take the commodity code on the requisition line (UN/SPSC code) and derive the CARS Sub-Object code for reporting. There is a different Sub-Object code for the same commodity if the item is for resale.
Fund Detail	For state agencies and higher education, the combination of fund and fund detail as defined in the CAPP manual.
Program/ Sub-Program/ Element	For state agencies, this is a function of government (from Dept. of Planning and Budget).

Sub-Object/Account	<p>A classification of expenditures as used by the entity's financial system. For state agencies, this may be a Sub-Object code as defined by CARS or it may be a different coding scheme as defined by the agency. Although this field is not mandatory for eVA, operational reports by "account" will not be useful without this value.</p> <p>(Note: eVA will automatically use the resale flag and the UN/SPSC commodity code from the requisition to derive the CARS Object/Sub-Object code for the data warehouse).</p>
Cost Center/ Organization/ Speed Code	<p>Organizational entity within the COVA entity for which costs are tracked. Often relates to a budget. Usually has a manager assigned to oversee responsibility of costs. Some entities may want to use a "speed code", which can be used in their own financial system to derive other values. Although this field is not mandatory for eVA, operational reports by "cost center" will not be useful without this value.</p>
Project	<p>A code to associate costs to a project. A project may cross cost codes. These are projects as defined by the agency or local government.</p>
Grant	<p>A funding source for tracking costs for a specific grant. (could be federal, state, or private grants).</p>
FIPS Code	<p>The Federal number assigned to a county, city, or town. This field should only be used for counties, cities, and towns in Virginia.</p>
Accounting Cross Reference	<p>This field can be used by entities for cross-reference tracking at the accounting line level.</p>

5. *Understanding Requisition Approval Rules*

Agency Business Rules

Each agency will define its business rules for requisition approval. These rules identify the individuals who must approve the requisition and the sequence for approvals. Some rules are defined at the User Profile level; others are defined at the Group Profile level.

The map below, "Possible Requisition Approval Steps," outlines the available choices of approval steps and the order they will be executed. The system can be configured with as few steps as the agency wishes. It is recommended that the decisions be reviewed by whoever normally reviews controls for the agency, such as the internal auditing staff.

Requisition Approval Workflow

Workflow is generally thought of in terms of rules, roles, and routings. The routing or order in which the requisition approval workflow steps are performed is currently predefined. The rules are generally based on comparing dollar amounts on the requisition to predefined amounts on the user profile or group profile in order to determine whether a certain approval step should be triggered. If the dollar amount conditions are met, an associated approver will be inserted into the approval workflow. Generally, these approvers are defined as roles. One or more people can be assigned to a role. A person can be in more than one role. Let's examine two different scenarios that could impact how you define your business rules.

EXAMPLE 1 – WHEN THE SHOPPER IS THE REQUESTOR

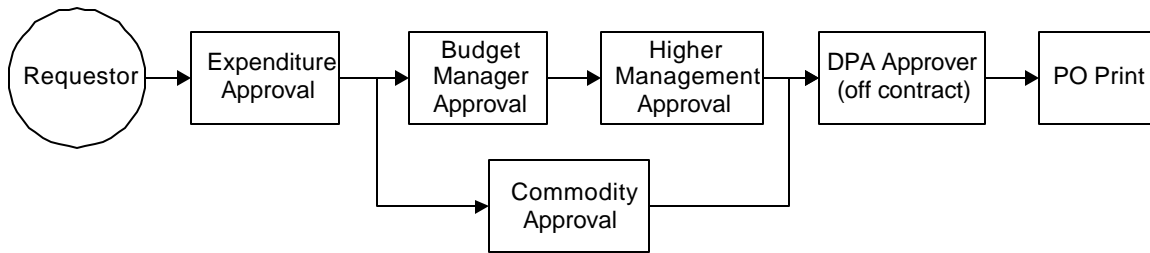
When a shopper logs in on the eMall and goes shopping, the requisition that is created assumes the shopper is buying items for himself or herself. In other words, the shopper is the requestor. The approval flow is built based on rules for the requestor (based on the user profile and which group profile the user profile points to).

EXAMPLE 2 – WHEN THE SHOPPER IS NOT THE REQUESTOR

At the beginning of the requisition, the shopper can change the requisition to indicate that they are not buying items for themselves, but they are buying "on behalf of" someone else. The person they are buying "on behalf of" becomes the requestor. Shoppers (users who create online requisitions) can choose anyone in their agency who has been set up in the eVA eMall system to be the requestor. The requisition data defaults and the approval flow is built based on the requestor's rules. For example, if you are shopping on behalf of Jane Doe, the defaults and approval rules for Jane Doe, not you, will be used. To learn more about requisition approval workflow use the following documents.

- Possible Requisition Approval Steps
- eVA Requisition Approval Rules Structure

Possible eVA Requisition Approval Steps



The system can be set up so that any of these steps can be included in the approval flow.

Expenditure Approval	This is a requestor's individual authority to spend money. For each user, a minimum expenditure dollar amount and associated approver can be defined. If the requisition total is the same as or greater than this amount, the specified approver will be added to the flow.
Budget Manager Approval	An agency can define a code on the requisition that will add an approver based on a code value and minimum dollar amount. An example might be cost code. When a requisition is submitted with the specified cost code and the item amount is the same or greater than the specified amount, the approver will be added to the flow.
Higher Management Approval	Up to 3 minimum dollar amounts and associated approvers can be defined for each group profile. For each of these possible steps, when the requisition total is the same as or greater than the specified amount, the dollar approver will be added to the approval flow.
Commodity Approval	Up to 40 commodity codes (based on 4-digit or 6-digit UN/SPSC codes) and associated approvers can be defined for each group profile. This approval is not based on dollar amounts. Examples might be commodity approvals for computer equipment or software purchases.
Delegated Purchasing Authority (off contract only)	For each user, a minimum delegated purchasing authority amount can be defined. The associated approver is defined for the group profile that person belongs to. When a requisition has an item that is not on contract, and the requisition total is the same as or greater than the delegated purchasing authority amount, an approver will be added to the approval flow. Typically the approver will be someone in the role for the agency's procurement office.
PO Print	Any PO that will not be electronically sent to the vendor can be routed to an "approver" to print the PO and fax or mail to the vendor.
Ad-Hoc Approver	<i>The requestor or any approver can add an approver or watcher anywhere in to the flow. A watcher is notified of the requisition but does not approve it.</i>
Commodity Code Watcher	<i>Up to 10 commodity code watchers (based on 4- or 6-digit UN/SPSC codes) can be defined for each group profile. A watcher is notified of the requisition but does not approve it.</i>

eVA Requisition Approval Rules Structure

The tables below list the approval rules available at each level.

Some approval rules vary for each individual user:

USER PROFILE RULES

Approval Amount	Approver
Expenditure Amount	Expenditure Approver
Delegated Purchasing Authority (DPA)	(See Group Profile)

Some approval rules vary for each group of users, as identified by a single group profile:

GROUP PROFILE RULES

Approval Amount	Approver
Management Dollar Amount 1	Management Approver 1
Management Dollar Amount 2	Management Approver 2
Management Dollar Amount 3	Management Approver 3
See User Profile	DPA Approver
Commodity Category/Code 1 specified) through Commodity Category/Code 20 (no amounts specified)	Commodity Category/Code Approver 1 through Commodity Category/Code Approver 20
PO Printing rule (no amount specified)	PO Print
Commodity Category/Code 1 through Commodity Category/Code 10 (no amount specified)	Commodity Category/Code Watcher 1 through Commodity Category/Code Watcher 10

Some approval rules vary according to a pre-selected field on the requisition:

BUDGET MANAGER RULES

(Based on specified field on requisition)

Code Value	Approval Amount	Approver
Code Value 1 through Code Value n (unlimited)	Code Amount 1 through Code Amount n (unlimited)	Code Approver 1 through Code Approver n (unlimited)

Notes about approvers:

An approver is a role. More than one person can be assigned to a role. While all approvers can be identified as a name or a role, it is recommended that most approvers be identified by a role. The exception is expenditure approver, which might be identified by name rather than role.

When an approver is blank, an approver will not be inserted into the approval workflow.

When zero is the approval amount, the requisition will always insert the associated approver.

For the User Profile and Group Profile requisition rules:

When the requisition total is greater than or equal to the approval amount the associated approver is inserted into the workflow. Think of this amount as a minimum approval amount. This is the amount where the approver starts approving requisitions. For instance, if Joe Smith approves everything up to and including \$5,000 and his manager, Jane Doe approves everything above that, Joe's approval amount should be set at \$0.00, and Jane's should be set at \$5,000.01.

The Budget Manager rules (also called signer rules) are based on a field on the requisition the agency has designated for approval flow purposes. This field could be on the requisition header, item line, or accounting line level. If the field is on the requisition header, the requisition total will be compared to the approval amount. If the field is on the line level, the line amount total will be compared to the approval amount. If the field is on the accounting line level, the accounting line amount will be compared to the approval amount. These approval amounts also represent the amounts where the approver starts approving requisitions (the minimum amounts).

6. Understanding Receiving Rules

Two Basic Approaches for Receiving:

There are two basic choices for setting up receiving, either desktop receiving or central receiving. When using desktop receiving the requestor will automatically be inserted into the receiving workflow. For central receiving, someone other than the requestor does the receiving. That person or group of people in the receiving role for a given group profile (buysense org) will do the receiving for everyone in the group profile.

DESKTOP RECEIVING

For desktop receiving, the group profile can be set up to define commodity code receivers to be inserted into the receiving workflow prior to the approval step for the requestor.

Up to two commodity receiver roles could be set up. The agency can specify up to 20 commodity codes (the 4 or 6 digit level of UN/SPSC codes) for each commodity code role. These commodity codes are the same codes as those defined for the commodity code requisition approvers.

Commodity Code Receiver 1 ---> Commodity Code Receiver 2--> Requestor

In the desktop receiving model, the first Commodity Code Receiver (if one is present) submits the receipt. The second Commodity Code Receiver (if present) approves the receipt, and then the Requestor approves the receipt.

If no Commodity Code Receiver is present, the Requestor submits the receipt. No approval would then be needed.

CENTRAL RECEIVING

For central receiving, a receiving role is defined on the group profile. Anyone in that role can receive items for that group profile. The central receiver can be followed by up to two commodity code receivers. These commodity code receivers are defined in the same way as the commodity approvers for desktop receiving.

Central Receiver ---> Commodity Code Receiver 1 ---> Commodity Code Receiver 2

In the central receiving model, the Central Receiving Role submits the receipt. If Commodity Code Receiver 1 or 2 is present, that role approves the receipt. Otherwise, no approval is required.

Note that in central receiving, the Requestor never handles the receipt.

7. Understanding User Profiles and Roles

User Profiles

Each agency needs to identify each person who needs to be set up in the system and who needs a login and password to the eMall. Anyone who has a login has access to create requisitions. Users who need to be set up in the system might include:

1. People who will be logging in to shop and create requisitions on the eMall.
2. Anyone who should be selected as the requestor for the "on behalf of" feature on the requisition header so their requisition defaults, requisition approval and receiving rules will be used.
3. Anyone who will be approving requisitions, such as:
 - *Expenditure approvers*
 - *Budget approvers*
 - *Higher management approvers*
 - *Commodity approvers*
 - *DPA approvers*
 - *PO printers*
4. Anyone other than the requestor who will be receiving (central receivers and commodity receivers).
5. Accounts Payable users
6. For all users, their supervisor needs to be able to log in to approve any changes the person makes to their user profile.

For each user, gather the following information:

- First Name & Last Name
- E-mail address
- Phone Number
- Which group profile the person belongs to
- Expenditure Limit (optional)
- Expenditure Approver (optional)
- Delegated Purchasing Authority Limit (optional)
- Supervisor's First Name and Last Name
- Ship to Address
- Catalog Controller

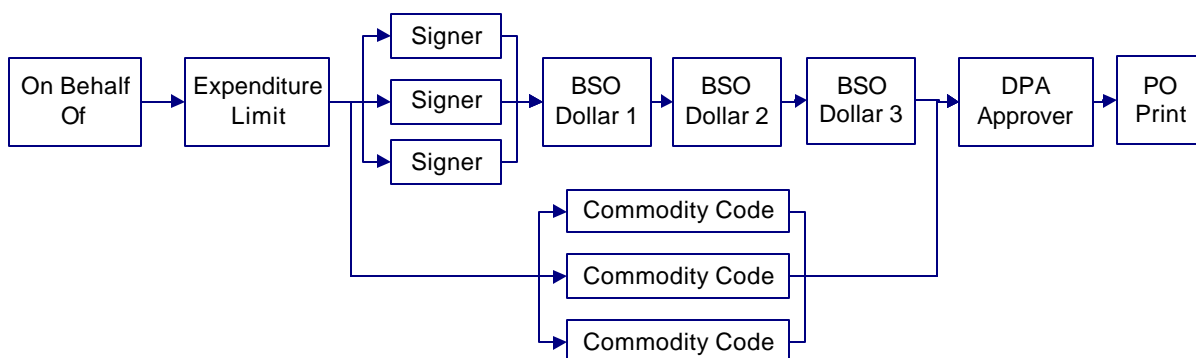
Roles:

Roles are generally used in establishing approvers or receivers (other than the requestor). A role can have more than one person. A person can be in more than one role. A person does not have to belong to a role at all.

Roles must be named so the first position identifies whether the entity is an agency or local government ("A" or "L"), the next position identifies the agency number for state agencies or the FIPS code for local governments. The rest of the role name should be descriptive of its use. Some have chosen to also indicate the group profile for roles that are specific to group profiles.

For example, A194-BFM Director is the role name for agency 194 (Department of General Services) and BFM indicates the Bureau of Facilities Management, which is a group profile within DGS.

8. eVA eMail Standard Approval Flow



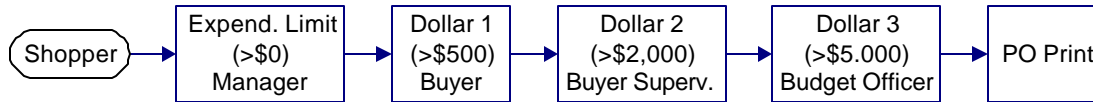
This is a graphical representation of the eVA standard approval available to agencies. Each box represents a potential handler of a requisition inserted automatically into the approval flow based on the rules set up for that user and agency.

EVA APPROVAL ROLES

On Behalf Of	If the shopper lists someone else in the On Behalf Of field, that person will be inserted first into the approval flow.
Expenditure Limit Approver	A lower limit, along with a name of approver to be added for any requisition greater than or equal to the limit. Set individually for each user.
Signers (Budget Managers)	A separate list of approvers related to any field on the requisition header or accounting line. Common signers are division or cost code managers. Can be based on minimum dollar thresholds.
Dollar Approvals	Up to 3 minimum dollar thresholds & approvers can be set. If a requisition equals or exceeds the threshold, the listed role is inserted into the approval flow. Set by BuysenseOrg.
Commodity Code Approvers & Watchers	Approvers and watchers can be added in parallel to the approval flow for selected commodity codes, such as IT or telecom commodities. Approvals in parallel can happen at any time while approvals on a separate parallel track are being applied.
DPA Approver	The buyer who must approve off-contract requisitions that exceed a user's DPA. The DPA is set individually for each user, but the DPA Approver is designated at the BuysenseOrg.
PO Print	Any requisition going to a supplier not set up with Ariba to receive orders electronically must be routed to the PO Print role for an assigned user to print out the purchase order and deliver it to the supplier.

Sample eVA Approval Workflows

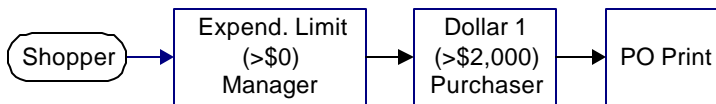
Workflow 1



This agency's workflow involves several steps including the individual's manager as Expenditure Limit approver for all purchases, and buyer involvement for purchases over \$500 (set up as "\$500.01"). The buyer's supervisor is also added to the flow at \$2,000, and the budget officer reviews any purchase over \$5,000.

As with all sample workflows, the requisition goes to the PO Print role if it cannot be delivered electronically to the supplier.

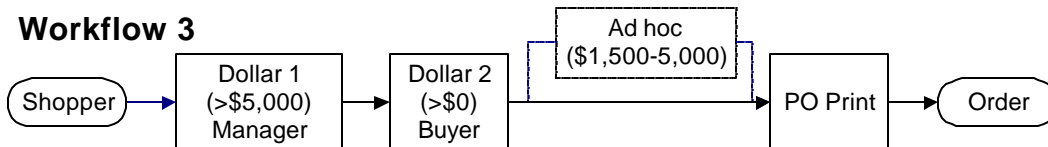
Workflow 2



This agency's workflow is very simple, and a good example for smaller agencies. All purchases go through a person's manager, although managers themselves might be set not to require an approver for this step. All purchases over the \$2,000 threshold are routed to the purchaser (buyer).

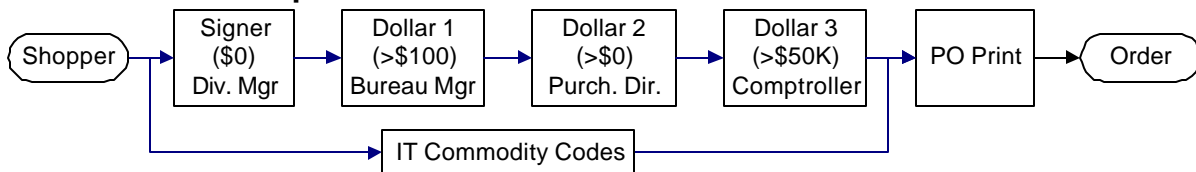
No commodity approvers are involved.

Workflow 3

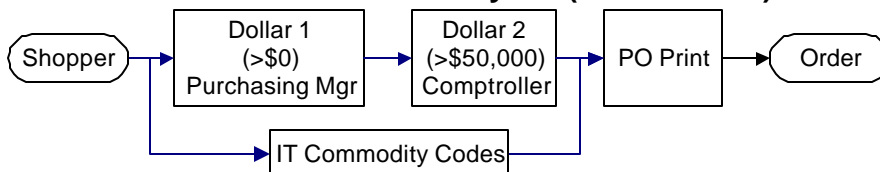


This agency wants a lower manager to approve requests between \$1,500 and \$5,000. To do this, the buyer will add the manager as an ad hoc approver for these items. Notice also that the higher manager sees items over \$5,000 *before* the buyer sees them.

Workflow 4A: Requisitioners



Workflow 4B: Professional Buyers (Stock Items)



This agency has 2 workflows.

In Workflow 4A, requisitions from the field are approved by division & bureau managers before going to the purchasing director. In Workflow 4B, the 5 professional buyers buy stock for the warehouse. Their requisitions go directly to the purchasing director.

In this large agency, all IT commodity purchases require IT approval.

D. SETTING UP WITH THE eVA DATA COLLECTOR

(How Do We Give You All the Setup Data You Need?)

The eVA Data Collector is a data-collection tool that will help you collect and organize the many decisions you have to make and enter the data you need to set up your agency for eVA. It is a standalone program on a CD that you can run on your own PC to enter your agency's data. You will not need any special software applications to use the Data Collector.

Here are the steps you need to follow to make the most of your Data Collector tool:

1. **First Step Data Setup:** Using the First Start setup at the beginning of this section, turn in your list of users to your eVA Agency Adoption Team. They will use this data to create login IDs for your users and prepare your Data Collector for your specific agency use.
2. **Workflow Study:** Based on the above explanation of eVA workflow options, determine what approvals you wish to set up through the Data Collector.
3. **Data Collector Entry:** Begin following the steps of the Data Collector, entering data on each form in sequence. Those steps are outlined below.
4. **Review Data Collector:** Using the tools of the Data Collector, review and edit your data for any changes.
5. **Submit Data Collector:** Transfer the Data Collector to AMS technical staff, either electronically via email, or by saving the file to disk and physically sending the information. AMS will then upload the data to eVA. (Your Agency Adoption Team will assist.)
6. **Test your eVA Data:** Once the data is uploaded into eVA, you will want to examine and test your data online to make sure that eVA is working for your agency the way you want it to. Your Agency Adoption Team can guide you through the steps of testing your approval flows, accounting reference data and defaults.

Following are the step-by-step instructions for entering your data into the Data Collector. It assumes that you have already studied your workflow and decided what approvals you want to require.

STEP 1: USER NAMES/CONTACT INFORMATION

You may have already submitted a list of users that you intend to have go live first. If so, you can skip this step, as those users have already been loaded into the Data Collector for you, along with the login IDs that have been created for them.

If you haven't submitted a list, then this is the time to determine who you want to begin using eVA first at your agency. Depending on the implementation strategy you chose in Section II, you may be including:

- Users who “shop” in eVA and prepare requisitions on behalf of others by selecting items;
- Users who complete requisitions themselves (requestors);
- Managers and buyers who approve requisitions (expenditure approvers, commodity approvers, cost center approvers, delegated purchasing approvals;
- Receivers who process receipts on goods and services received, including central receiving location personnel and commodity receivers; and
- Accounts Payable/Fiscal users who want to review orders and receipts in eVA to verify that payments are due; and
- Personnel Supervisors for each user

At this form, you only need to enter the user's Last Name, First Name, and e-mail address. You may also enter a phone number and employee number if you want.

About Personnel Supervisors: Be sure that every user has a personnel supervisor also registered to use eVA. Supervisor relationships may not be reciprocal or circular; they must be hierarchical. Only selected users may have no personnel supervisor. If a user is set up without a supervisor, they will not be able to process any documents in eVA until they either request & receive a supervisor, or they request and receive the “no supervisor” permission.

STEP 2: ADDRESSES

The first form asks you to enter addresses for all of the Shipping and Billing locations for your agency. Enter both types of addresses on the same form

Shipping Addresses	Enter all shipping addresses used at your agency. There may be a single central receiving location for an agency such as a warehouse, or there may be shipping addresses for each bureau or division. Use the radio button to designate your address as a shipping address.
Billing Addresses	List all billing addresses used at your agency. Billing addresses are assigned at the BuysenseOrg form in the Data Collector. Use the radio button to designate your address as a billing address, and add “-Billing” to the end of the unique name.
Unique Location Name	Each address must have a unique name that begins with your agency number and acronym. For example, all DGS locations begin with “A194DGS-” (no spaces). Billing addresses end with “-Billing”, but shipping addresses have no such designation. Be brief. If you have an ERP system, use the ERP’s unique identifier for addresses immediately following the agency acronym.
Location Description	For a more descriptive display of the location name, use the Location Description. This field will not include the agency number, but should still begin with the agency acronym.
Contact	Enter a contact name. The contact can be anyone; it does not need to be an eVA user.

In a later step, you will be asked to assign a shipping address to each user, and a billing address to each BuysenseOrg.

STEP 3: ROLES

Roles are used to describe a function in eVA that one or many people can fulfill. The role might represent an approval function, a particular permission, or a responsibility. Examples of how roles are used:

Roles used for approval rules

Roles are most often used to determine who can approve a requisition or receipt based on the rules that govern your workflow.

- Many agencies have professional buyers that enter into contracts with suppliers and handle large off-contract purchases. At DGS, this role might be labeled “A194-Buyer” and may have several users assigned to that role.
- Many agencies have someone who is notified of (or approves) IT commodity purchases. An agency may have only one person assigned to that role, which at VA Dept of Health might be called “A601-IT Approver”.

Restricting access to reports

You can define which users can run which reports based on roles.

- Upper management or Accounts Payable may be assigned to a Global Reports role that allows access to global reports based on all users’ activity.
- Requestors may be restricted to access reports of their own requisitions.

Assigning Permissions

You may assign special permissions to users by using roles rather than assigning them as permissions. There are three such roles commonly used in eVA.

- *eVA-EditApprovable* gives the EditApprovable permission to approvers so that they can edit documents that come to them for approval, rather than having to deny the document and send it back to the requestor for editing.
- *eVA-QueryAll* gives the QueryAll permission to view all eVA documents, not just the ones that they have created or that are created in their behalf.
- *eVA-ReceiveAll* gives the ReceiveAll permission to users who need to be able to receive goods and services from anyone in the agency, not just the ones that they themselves have ordered.

Using the Roles form, add your agency-specific roles. There is no need to enter the eVA-wide roles. They will already be loaded for you.

Naming Convention: For your agency-specific roles, such as approvers, begin the role name with your agency type (A=Agency, L=Local Government), agency code (or FIPS code for local governments), and hyphen. For example, a DGS buyer is in the role *A194-Buyer*.

STEP 4: USER ROLES

Since you have probably set up many approving and receiving functions as roles rather than as individuals, here is where you can associate users to roles.

One user can be associated to many roles, and each role can have many users in it. It is also possible that a role would only have one user in it.

Be sure, however, that every role has at least one user in it. Otherwise you could end up with a requisition waiting for an approval that no one can apply.

Check to see whether your naming convention was consistent when you entered the roles earlier.

NAMING CONVENTION

Letter Prefix	<u>A</u> gency <u>L</u> ocal Government
Agency Number	3-Digit Agency or FIPS Code
Hyphen	“-“ (not the underscore key: “_”)
Examples	A DGS Buyer would be <i>A194-Buyer</i> . A TRS receiver would be <i>A151-Receiver</i> .

STEP 5: REQUISITION FIELDS

In eVA, a requisition has a single header, unlimited item lines, and up to 99 accounting lines per item. You can choose the fields that you wish to display in your requisition header and in your accounting lines. Some of the fields that are available to you are standard across eVA, others are available to your agency to customize.

	# Fields	Comments
Requisition header	10	Some are set throughout eVA, some can be selected and configured by your agency. You can decide how to use each field, but you can only rename certain fields.
Commodity lines	10	
Accounting lines	40	Some fields are reserved throughout eVA, but you may choose not to display them. The rest are available to your agency to name and configure as you wish.

Configuring fields

You have several options for each field.

Field label	You may rename the field for your agency's purpose. For example, you may rename Sub-Object/Account to Object Code. Some fields are reserved by eVA for use throughout eVA, such as Entity Code and Fiscal Year. Although you could rename the field, their purpose will remain reserved by eVA.
Display on requisition	Select this option if you want this field to be displayed on the requisition.
Editable on requisition	Select this option if you want users to be able to change from a default or blank value.
Optional/Mandatory (not on this form)	You will need to decide separately whether each field is optional or mandatory. Fiscal Year and Entity are already set to Mandatory. (You will submit this information separately.)

STEP 5A: REFERENCE DATA (EXTERNAL FILE)

You may want various requisition fields to be edited against lists of valid values before a requisition can be submitted. Cost Center, Object, Fund Detail, and Program are examples of fields that you might want to limit.

In addition, you can establish “filters” that cross-reference two fields. So, for example, you may allow only some cost centers with one fund code and other cost centers with another fund code.



To establish reference data in eVA, you will need to submit separate files showing the field name, the valid values, and descriptions to go with the valid values.

To establish filters, you will need to submit separate files showing two columns, headed by the field names being filtered, with the valid combinations listed below.

Here are examples of object codes and filters used by early-adopting agencies.

OBJECT CODES

Object	Description
1211	Express Services
1213	Messenger Services
1215	Printing Services
1221	Organization Memberships
1222	Publication Subscriptions
1312	Office Supplies
1373	Computer Operating Supplies
2263	Office Incidentals

FUND/COST CODE FILTER

Fund	Cost Code
0100	102
0100	103
0100	104
0200	203
0200	204
0700	102
0700	202

STEP 5B: ASSET TAGS (EXTERNAL FILE)

eVA can require receipts to include asset information depending on the commodities being received.



To establish this requirement in eVA, you will need to submit a file showing the commodity codes for which you want to collect asset tag information upon receipt. Include “No” in the Required column, since this is a COVA-wide setting.

Save the file with the name “999ASSET.XLS”, with your agency code in place of the 999.

ASSET TAG COMMODITIES

Commodity Code (4- or 6-digit UN/SPSC code)	Required (Must be set to No)
	No
	No
	No

STEP 6A: GROUP PROFILE (ACCOUNTING LINE DEFAULTS)

Accounting Field Defaults

One of the characteristics of users sharing a common BuysenseOrg is that they share a set of default codes in their accounting codes or requisition header data. This is where you establish the defaults for any fields you select for this BuysenseOrg.

For example, you may select Cost Center, Sub-Object/Account, and Program to have defaults. Then on this form, you would enter the default values for each field.

Note that each BuysenseOrg within an agency can choose different fields to have default values.

STEP 6B: GROUP PROFILE (REQUISITION HEADER DEFAULTS)

Similar to the Accounting Defaults, there can be defaults on the requisition header. This is where you can establish defaults for any fields you select for this BuysenseOrg.

For example, you may select Cost Center, Sub-Object/Account, and Program to have defaults. Then on this form, you would enter the default values for each field.

Note that each BuysenseOrg within an agency can choose different fields to have default values.

STEP 6C: GROUP PROFILE (WORKFLOW & RECEIVING)

The BuysenseOrg is the group profile for users who share a common workflow, shipping procedure, billing address, and accounting defaults. The BuysenseOrg form is where you define the workflow and defaults for each of your agency's groups.

To fill out this form, you must have completed your workflow analysis and entered your agency-wide information (e.g., shipping & billing locations). Based on your analysis, you may have decided that your agency can use a single BuysenseOrg for all of its users. Or you may have created several BuysenseOrgs to represent different receiving methods.

The following information is needed for each BuysenseOrg:

Requisition Workflow

There are several options at the BuysenseOrg level for assigning approval roles:

BUYSENSEORG APPROVERS

Dollar Approvals (Higher Management)	<p>You can set up to 3 distinct dollar amount thresholds that add a separate approver within your BuysenseOrg. The dollar levels act as minimum amounts, based on the total amount of the requisition. If, for example, the 1st Dollar Level is \$5,000.01 and the Dollar 1 Approver is A194-DPS-Admin, then a requisition for \$6,000.00 will require A194-DPS-Admin approval. The approver is usually entered as a role (e.g., A152-Purchasing Agent), not as a user's name.</p> <p>Note that if there is no approver specified, there is no approval required.</p> <p>In addition, the dollar levels do not need to be in order of ascending amounts. For example, a Purchasing Manager may want to be the last approver of all items. In this case you might set this role as the 3rd Dollar Approver at a 3rd Dollar Level of \$0.00.</p>
DPA Approver	<p>The DPA Approver is the buyer that is added to the approval flow for any requisition for off-contract items over an individual user's Delegated Purchasing Authority.</p> <p>Note there is one approval role for each BuysenseOrg. While different requestors may have different DPA amounts, all requests within a BuysenseOrg will go to the same buyer role if they exceed the requestor's DPA and they are off-contract.</p>
PO Print	<p>This is the role inserted at the end of the Approval Flow for any item ordered from a supplier who is not set up with Ariba to receive orders electronically. The person in the PO Print role is responsible for printing out the Purchase Order and getting it to the supplier.</p>

Later, you will need to identify users to each of the roles. All users assigned to a role will be notified when a document is awaiting an approval from the role. As soon as any one person in the role has approved the document, the document will proceed to the next step in the workflow and will be removed from the inboxes of other users in the previous role.

Receipt Workflow

Each BuysenseOrg uses a common workflow for processing receipts. There are two options: desktop receiving and central receiving. With desktop receiving, the requestor is responsible for completing and submitting the receipt when goods or services are delivered. With central receiving, there is a receiving role established for all goods and services received within the BuysenseOrg. Central receiving is appropriate when you have a central receiving location that is first to receive and process goods as they arrive.

RECEIVING SETUP & APPROVERS

Desktop Receiving	If you want requestors to submit receipts for their requisitions, select Desktop Receiving.
Central Receiving	If you receive through a central receiver, indicate the role that will be responsible for submitting receipts in eVA. Be sure to name the role using the agency code as a prefix (e.g., A194- for DGS).
Commodity Receivers	If you have special commodity receivers who are required to inspect certain items, or apply asset tags, you may wish to identify Commodity Receivers for those commodity categories. You may have two roles that approve up to 20 commodities each. One receiver can be inserted into the workflow for Commodities 1-20 (from the Commodity Approver list), while another receiver can be assigned to Commodities 21-40.

For example, DGS has centralized receiving for each BuysenseOrg. Therefore, users in the receiver role for each BuysenseOrg approve the receipts of all items received in the BuysenseOrg. Another agency uses desktop receiving; the user who enters a requisition approves the receipt of those items.

STEP 6D & 6E: GROUP PROFILE (COMMODITY APPROVALS/WATCHERS)

Approvers can be added to approval flows based on UN/SPSC commodity codes. You can choose the codes at the 4-digit Family or the 6-digit Class level, which are the 2nd and 3rd levels of detail in the eVA catalogs. For example, the Family for “Software” is 4316; the Class for “Multimedia software” is 431622, and “Drawing and imaging software” is 431619.

For each BuysenseOrg, approvers can be assigned for up to 40 commodity codes and watchers for 10 codes. These roles are not triggered on dollar amounts.

Most agencies using commodity approvers select them for IT, telecom, and software purchases.

COMMODITY APPROVERS & WATCHERS

Commodity Approvers	<p>You can add approvers to a requisition for up to 40 commodity codes used in requisition lines. Watchers can be added for up to 10 commodity codes.</p> <p>For example, any requisition from VDH with commodity code 4316 (software) inserts approver “A601-IT Approver” into the workflow.</p> <p>Please provide the UN/SPSC code for each commodity at either the category (4-digit) level or code (6-digit) level. If you use NIGP codes, you can look up the UN/SPSC code with the instructions below.)</p>
Commodity Watchers	<p>If you use a watcher instead of an approver, the users in the watcher role are notified of the requisition, but their approval is not required.</p>

LOCATING COMMODITY CODES

A list of all UN/SPSC codes can be found by following the steps below. You can view the codes on the web, or download for viewing with Microsoft Excel.

- Go to the eVA Portal at <http://www.eva.state.va.us>.
- Click on the tab that says “UNSPSC Search” near the top of the page.
- Click the link that says, “Download the UNSPSC Excel Spreadsheet.”
- Your Microsoft Excel will launch to view a complete spreadsheet of UNSPSC codes that will correspond with any commodity approvers you may need.
- Use the File: Save As... command to save the UNSPSC.xls file locally if you want to.

COMMODITY CODES COMMONLY USED IN EVA

- | | |
|------------------|---------------------------------|
| • 4316-Software | • 8111-CompServe |
| • 4317-Hardware | • 8311-Telecommedia |
| • 4318-Computers | • 431715-Telephony (under 4317) |

STEP 6F: BUDGET APPROVERS (“SIGNERS”) (AGENCY-WIDE/EXTERNAL FILE)

An agency may choose to add an approver to a requisition workflow based on specific fields on a requisition. Some agencies call these approvers “signers.” The field chosen typically represents a budgeting control, so that the signer selected by this rule is a first-level budget approver.

This optional approver role can be associated with any single field and minimum dollar amount on a requisition. The Signer Rule is applied agency-wide, not just within a BuysenseOrg.

For example, DGS assigns an approver for each cost center code that is required on every requisition line. Each cost center is assigned a Budget Manager as its approver and a dollar level that determines whether the Budget Manager is added to the approval flow. A requisition with several lines charging 3 different cost centers may have to be approved by each of the 3 Budget Managers, depending on the dollar values on each line.

As another example, VSP assigns an approver for each Division code that VSP has chosen as a mandatory field on the requisition header. No dollar threshold is assigned to the requirement. All VSP requisitions have a Division approver as the first approver in their approval flow.



In a separate file, please identify the field requiring an approval, the minimum amount requiring an approval if it applies, and the approval role to be added. Please follow the example provided in the table below. Name your role with your agency code as the prefix (e.g., A194- for DGS). Save the spreadsheet file with your agency code and “SIGNS”, such as 194SIGNS.XLS. You can work from a template named 999SIGNS.XLS provided.

SIGNER RULE (EXTERNAL FILE)

Field Requiring Approval	Minimum Amount Requiring Approval	Role of Approver which appears on Approval Workflow
<i>Cost Center 115</i>	<i>\$0.00</i>	<i>A194-Cost Center 115 Approver</i>
<i>Cost Center 116</i>	<i>\$5000.01</i>	<i>A194-Cost Center 116 Approver</i>
<i>Cost Center 153</i>	<i>\$0.00</i>	<i>A194-Cost Center 153 Approver</i>
<i>Division</i>	<i>-----</i>	<i>A156-Division Approver</i>

STEP 7: USER /ORGANIZATION INFORMATION

You've already prepared a list of people who you expect to be using eVA. If you have been able to submit the list in advance, the names and login IDs are already loaded into the Data Collector. If not, you were able to enter the names in at the beginning along with basic contact information.

Now complete the User Profile for each user as described in the table below.

USER PROFILE OPTIONS

BuysenseOrg	Assign the user to the BuysenseOrg (Group Profile) that helps to determine workflow and defaults for this user.
Expenditure Limit	Each user is assigned an expenditure limit that, when equaled or exceeded, requires an approval. If all requisitions should require a specific person's approval, set this value to \$0.00. If the value is set at 1,000.01, then requisitions for \$1,000.01 and above will add the expenditure limit approver to the approval flow.
Expenditure Limit Approver	This person or role is inserted into the approval flow when the requisition exceeds the expenditure limit. It might be a supervisor or budget manager. If Expenditure Limit Approver has a value, then there must be an Expenditure Limit.
Delegated Purchasing Authority (DPA):	The DPA is the maximum amount a requestor can spend off-contract without a buyer approval. Anything over this value will have the DPA approver (assigned by BuysenseOrg) inserted in the approval flow. This amount applies to all requisitions, whether using a PCard or not.
Shipping Address	Assign a shipping address name to each user from the list of addresses identified in the Agency Addresses form.
Personnel Supervisor	Select the name of the user's personnel supervisor for eVA. The supervisor must approve any user profile change. Also, if an approval has been pending for more than 3 days in a user's inbox, it will be forwarded to the user's supervisor for action. Each supervisor must be an eVA user. Supervisory relationships must be hierarchical, not reciprocal or circular. Users set up without a supervisor must request & receive a supervisor, or request and receive the "no supervisor" permission.

Section IV

Ready to Go Live

A. Validate Your eVA Setup

B. Training Plan

1. Classroom & Self-training Alternatives
2. Audiences and Courses
3. Training Equipment/Facilities
4. The Training Plan
5. Selecting Your Training Coordinator
6. Catalog of Manuals, Courses Offered & Schedules

C. Address Policy & Procedure Changes

1. Review eVA-wide Policies
2. Policies & Procedure Changes Due to eVA
3. Description of eVA Defaults

D. Support

1. Overview of Support Concept
2. Help Desk Details
3. Online Help

A. VALIDATE YOUR eVA SETUP

(How Do We Know We Entered the Right Data?)

Your Agency Adoption Team will guide you through the steps so that you can validate the data you have submitted through the eVA Data Collector.

B. TRAINING PLAN

(How Do We Prepare Users to Use eVA?)

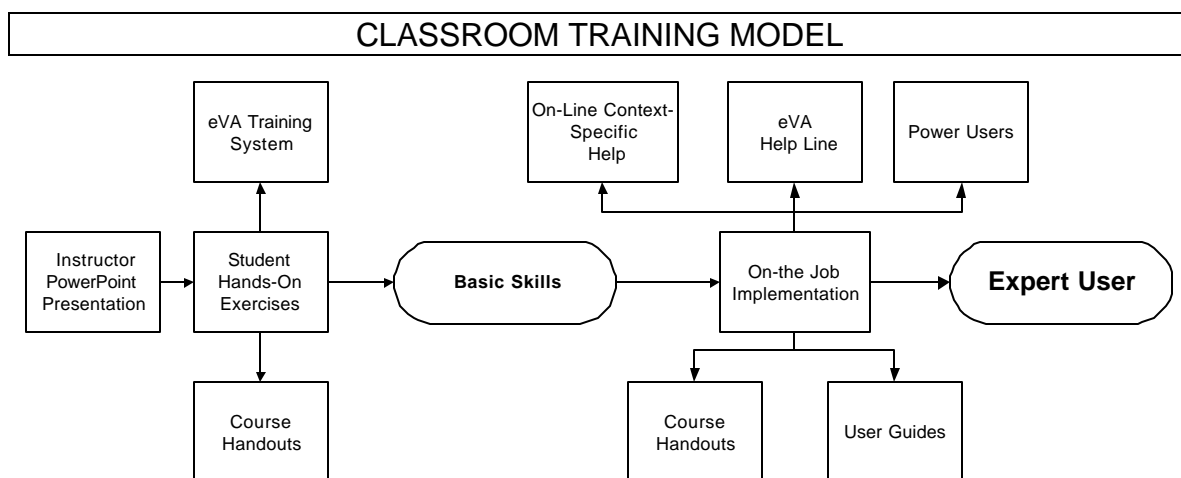
1. Classroom & Self-Training Alternatives

The overall approach is to begin initial deployment with hands-on classroom training and transition to self-guided as this training becomes available. Training materials, including PowerPoint presentations and hands-on exercises, have been developed and are now available. An independent self-guided, web-based training program is being developed and is expected to become the primary training medium.

Agencies should focus on facilitating the self-guided training, and schedule classroom-based instruction only for those groups who are expected to learn much more efficiently with the assistance available in the classroom environment. We expect that most people will be able to learn eVA usage through self-guided web-based instruction, however, it is expected that some employees may not.

Classroom Training

The eVA user develops expertise on eVA through training using a two-phased approach. In the first phase, instructor-led training is provided in a computer-equipped classroom. This training is hands-on with the instructor providing a brief PowerPoint demonstration of each eVA function followed by exercises during which the student follows the course handouts and practices performing the function in a “live” eVA training “environment” or system.

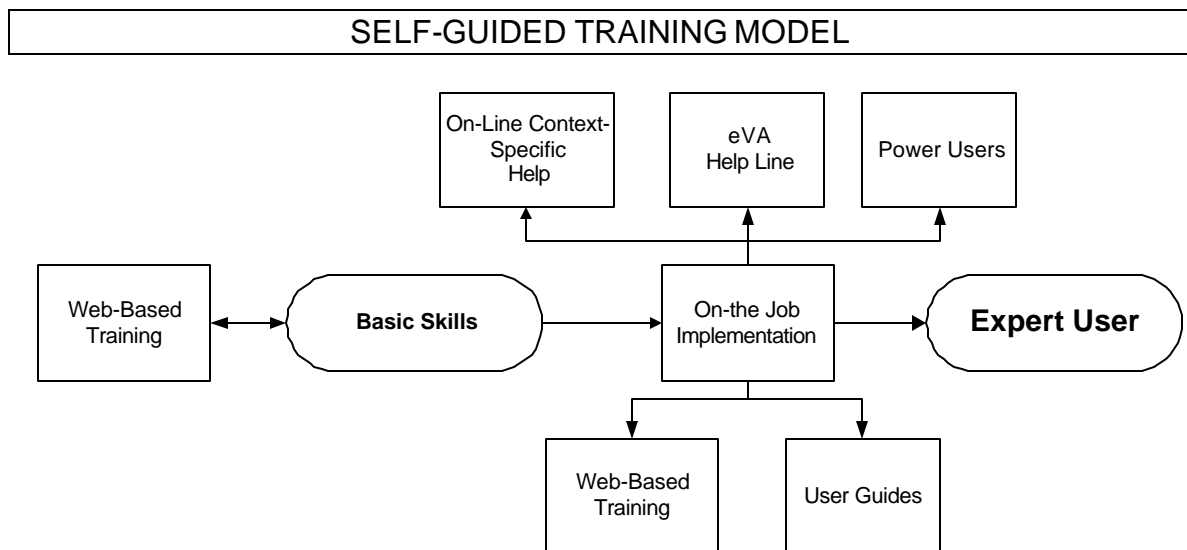


The eVA user leaves the classroom with basic skills and returns to the job where a variety of methods are available to obtain assistance in further development of eVA user skills. The course training handouts provide a quick-reference guide, and User Guides provide highly detailed instructions on all facets of eVA usage. eVA is a very intuitive system

and many users won't need help. Should the need arise however, a powerful online context-specific help provides user directions at the click of a button.

Self-Guided Training

With the self-guided option, the eVA user also develops expertise on eVA through training using a two-phased approach. In the first phase, web-based training is completed at the employee's desk using their desktop personal computer, Internet browser, and PowerPoint. Self-guided training covers the same eVA functions that are covered in the classroom training.



In the second phase, the eVA user develops expertise using a variety of methods available to obtain assistance in further development of eVA user skills. Powerful online context-specific help screens provide user directions at the click of a button, and online User Guides, which may be printed, provide highly detailed instructions on all facets of eVA usage. The web-based training is always available for review

eVA is a very intuitive system and many users won't need help. Should the need arise however, and the answer cannot be found in the available resources, an eVA help-line will be available during agency core business hours.

Prerequisite Skills

The set of prerequisite skills for eVA training requires the basic procurement skills required by the employee's job as well as basic personal computer and Internet browser skills. The employee should be a regular computer user and should have experience using a browser to perform basic Internet searches. The employee should be able to log onto a personal computer, start programs, use a mouse, and use Windows buttons and toolbars. Required basic Internet browser skills include navigating the Internet browser screen, using hot links, and conducting simple searches. Any potential eVA Users who do not

have these skills should complete this basic training prior to enrolling in eVA training. DPS can assist in identifying the required community college or vendor training courses.

“Power Users”

We are recommending that each agency develop a core group of Power Users to assist with the implementation. These Power Users are knowledgeable procurement personnel (or p-card holders) from throughout the agency who assist instructors with training and are available to help users with on-the-job implementation. Power Users generally develop expertise in eVA by being a member of the agency implementation team, attending one of the early training classes, or possibly participating in a Train-the-Trainer class.

2. *Audiences and Courses*

Instructor guides, and the self-guided training, provided by DPS will cover eVA usage required to perform basic procurement functions. The agency staff will be required to develop and present a brief agency-specific orientation for agency personnel who will be using eVA.

The eVA training needed by each user depends upon the role of the user. A number of classes have been developed but not all classes will be necessary for each end user. The audiences are the Requestor, the Approver, the Receiver, and Accounts Payable personnel. All users will need the first two courses offered shown below, for a total of 1 hour of training. Most users will need additional courses specifically developed for their role.

The courses offered are:

Course Name	Duration
Getting Started	½ hour
User Resources	½ hour
Operational Reporting	1 hour
Shopping	1 hour
Requisitions	2 hours
Approvals	1 hour
Receiving	1 hour

The table below indicates the eVA courses that should be completed by agency employees to prepare them to perform their eVA procurement functions. The audiences, roles, and classes needed for each are shown in the table below:

Audience	Functions	Classes Needed	
Requestor	Shop for a catalog item	Getting Started	½ hour
	Shop for non-catalog items	User Resources	½ hour
	Create requisitions	Shopping	1 hour
	Submit requisitions for approval	Requisitions	2 hours
		Operational Reporting	<u>1 hours</u>
		TOTAL	5 hours
Approver	Approves requisitions	Getting Started	½ hour
	Approves user profile requests	User Resources	½ hour
	Approves receipts	Approvals	1 hours
		Operational Reporting	<u>1 hours</u>
		TOTAL	3 hours
Receiver	Creates a receipt and submits for approval	Getting Started	½ hour
		User Resources	½ hour
		Receiving	1 hours
		Operational Reporting	<u>1 hours</u>
		TOTAL	3 hours
Accounts Payable	Searches for purchase and receipt documentation	Getting Started	½ hour
		User Resources	<u>½ hour</u>
		TOTAL	1 hour

3. *Training Equipment & Facilities*

eVA classroom training requires a room equipped with personal computers that meet the criteria specified elsewhere in this document for eVA usage. One computer is required for each student and one is required for the instructor. The instructor also requires the use of PowerPoint 97 or 2000 software and a LCD projector and screen.

Self-guided training requires a computer that meets the criteria for eVA usage and must also have PowerPoint 97 or 2000 installed.

4. The Training Plan

To effectively implement eVA, each agency team must work closely with the eVA training team to develop and implement a training plan. The table below lists the responsibilities of the DPS eVA training team and the responsibilities of the agency eVA training teams. Many of these items will be integrated into the agency training plan.

DPS	Agency
<i>Administrative</i>	
<ul style="list-style-type: none">• Serve as overall training lead• Conduct training orientation for agency trainers• Assist agencies with training as needed• Set-up & maintain eVA Client Support. (Help Line)• Identify alternative sources of training facilities & instructional staff as needed	<ul style="list-style-type: none">• Notify DPS of agency staff member assigned as Training Coordinator• Filter all training questions & issues through agency training contact• Develop & maintain centralized point of contact for agency-specific questions
<i>Instructional Materials</i>	
<ul style="list-style-type: none">• Develop & maintain generic instructor guides<ul style="list-style-type: none">➢ Getting Started➢ User Resources➢ Shopping➢ Requisitions➢ Approvals➢ Receiving➢ Operational Reporting• Develop & maintain generic user guides<ul style="list-style-type: none">➢ Basics➢ Requisitions➢ Approvals➢ Receiving➢ Operational Reporting➢ Glossary• Develop & maintain supplementary training materials on state policy changes and exceptions• Provide electronic copies of instructor (PowerPoint) & user guides (Word)• Develop, deploy, & maintain web-based, self-guided training for all eVA Users	<ul style="list-style-type: none">• Develop brief agency-specific eVA orientation for agency personnel• Develop & maintain supplementary training materials (& handouts) on agency policy changes and exceptions

Instructors

- Provide guidance in selection of instructors
- Notify each agency of allocated slots in Train-the-Trainer classes
- Provide (1.5 day) Train-the-Trainer training for agency instructors
- Identify instructors & Power Users
- Obtain commitment for Power Users to assist with training
- Provide orientation for potential instructors & Power Users
- Enroll instructors in Train-the-Trainer
- Orient instructors to supplementary training materials on agency policy changes/exceptions
- Assign instructors & Power Users to courses

Classes

- Set up & maintain eVA training database
- Manage daily allocation of eVA training environment User IDs
- Provide regular updates on training completions to eVA project management
- Provide agency-specific orientation & orientation to self-guided training
- Identify employees needing classroom training
 - Requestors
 - Approvers
 - Receivers
 - Accounts Payable
- Cluster employees for cost-effective training
- Develop tentative training schedule
- Reserve training User IDs with DPS
- Provide DPS a copy of your training schedule
- Schedule employees for training
- Fully test all computers & training equipment prior to training
- Conduct employee training
- Obtain classroom training feedback

7-1-2001 & 12-1-2001 Modifications

- Develop strategy & coordinate training on 7/1 & 12/1 modifications
- Provide training on 7-1-2001 and 12-1-2001 modifications

5. Selecting Your Training Coordinator

Courses on eVA should be taught by experienced instructors, technically competent in the use of computer software and Internet browsers, and very knowledgeable about agency and COVA procurement policies. Any instructor who does not have extensive knowledge of procurement should be teamed-up with a procurement professional to team-teach the classes. Inexperienced instructors should team-teach the course with a qualified instructor until ready to assume full responsibility for the course. To assist with your selection of a Training Coordinator, ask yourself these questions:

1. Does the person have teaching experience?
2. Are they technically competent in the use of computer software (Windows/MS Office) and Internet web browsers?
3. Are they knowledgeable of agency and COVA procurement policies?
4. Is the person competent in using PowerPoint and presentation equipment (laptop/LCD projector)?
5. Do they have good presentation skills demonstrated by:
 - *Willingness to give presentations in front of groups of people*
 - *Can handle negative comments or negative people*
 - *Can speak clearly and with an appropriate vocabulary to convey information, including the ability to use simple terms instead of jargon*
6. Do they have very good interpersonal skills demonstrated by some or all of the following:
 - *Able to talk with many different types and levels of people*
 - *Able to make new people feel comfortable and welcome*
 - *Freely offers praise and positive feedback*
 - *Able to deliver negative feedback in a constructive (positive) way*
7. Are they organized in their working habits? Many things happen simultaneously in training, the trainer needs to be organized and assert that organized approach on the class.
8. Are they able to think on their feet in order to handle or table questions asked in class?
9. Do they have a positive attitude?
10. Are they well respected by their peers?

We need the right people to help us make you successful with the implementation of eVA. They need to bring the knowledge of your agency's business practices and specific policies and rules to the implementation team. Although the preliminary planning stages will mean a significant commitment of time from these key individuals, it is essential to assure a smooth transition in to the eVA system and to achieve the initiative's goals.

C. POLICY & PROCEDURE CHANGES DUE TO eVA

(How Will Our Way of Doing Business Change Now that We Use eVA?)

1. **Review eVA-wide Policies**

This section will be delivered to you once your agency is ready to go live.

2. Identify Agency-Specific Rules & Procedures and Changes Brought About by eVA

This section will be delivered to your agency at a later date.

D. SUPPORT

(Where Can We Turn for Help When We're Using eVA?)

eVA support will be available from several sources. First-level support and assistance in using the system may be obtained through the expertise gained from users of the system in your own agency. Check with your agency trainers first. Support is also available through a regularly staffed telephone Help Desk. AMS will staff a buysense Hotline where telephone support is available sixteen hours per day, Monday through Friday. Another type of support offered will be through posting e-mail questions to a Customer Care Team.

1. *Overview of Support Concept*

First-Level Support

Many questions are best handled at the agency, such as:

- Forgotten passwords
- Trouble with PC or Internet connection
- Agency-specific procedures
- Purchasing policy issues
- Quality of goods and shipments of goods
- Questions about other applications

These questions will be resolved more quickly if you work through your agency resources first!

Other questions that might also be best handled at the agency include:

- How to use eVA
- Finding the data you need

In these cases, check with your trainers or expert users at the agency first. They may know the answers you need. If they don't know, they may want to call the Help Desk support, as mentioned below, so they can learn the answer and help others in your agency who may have the same question.

2. *Help Desk Details*

Customer Care (Buysense Hotline)

Phone Toll free: 866-*Buysense* (866-289-7367)

Hours: 6 am to 10 p.m. (ET), Monday through Friday

The *buysense* Customer Care Team (CCT) Consultant who answers the telephone will be trained on the application and will be able to assist you directly. If you need to report a problem with the eVA system, report it to this group, either by phone or e-mail. The CCT Consultant will follow-up on the matter and report back to you as the status of the problem progresses.

The CCT consultant will be a single point of contact, who will be able to help you with all issues and questions you have, such as:

- eVA functionality
- User profile maintenance

The CCT consultant will not be able to help you with:

- Questions about other applications
- Purchasing policy issues
- Quality of goods and shipment of goods

3. *Online Help*

E-mail

Post your issues through the eVA Portal.

Or you can send e-mail to support@buysense.com.

Hours: 6 am to 10 p.m. (ET), Monday through Friday.

The *buysense* Customer Care Team (CCT) Consultant will be able to assist you.

Using e-mail: A CCT consultant will reply to e-mail within 2 hours if it is received during CCT hours. E-mail that is received on weekends, holidays or after hours will be acknowledged by 8am (ET) on the next Business Day.

Section V

Grow Your Use of eVA

A. Revisit Previous Decisions

1. Policy & Procedure Changes
2. User Roles & Permissions
3. Workflow
4. Training Plan

B. Rollout Plan

C. The Rest of Your Suppliers

1. Identify Your List of Suppliers
2. COVA Will Help You Contact Your Suppliers

D. Maintenance

1. Maintaining Agency-specific Data
2. Troubleshooting Agency Access to eVA
3. Technical Support for Agency IT Staff

E. Glossary

F. Special Term & Condition

G. Reports Available in eVA

H. Other Documents

1. Memorandum from Governor's Office
2. eVA Launch Press Release
3. Executive Order 65 (00)
4. Other Documents from Your Agency Adoption Team

A. REVISIT PREVIOUS DECISIONS

(Now that We Have Experience, Can We Make Changes?)

All of your purchasing procedures and controls in eVA are driven by the data you turn in to set up your users in eVA. It is extremely important to have accurate data that truly represents how you have chosen to do business.

During the initial 30-day start up phase, you will have several opportunities to work with your data.

1. Gathering initial data, before even meeting with your Agency Adoption Team
2. Going over data with your Agency Adoption Team, and making changes as needed.
3. Settling on the data you want to submit.
4. Reviewing the data again after your Agency Adoption Team has reviewed it and ensured that it is ready for eVA.
5. Testing the data in the eVA System Test environment before going live.

After going live, we recommend that you review your data setup again to see that it truly reflects the way you intended to do business in eVA. If you need to make changes, it is up to you.

Your administrator has the responsibility for maintaining the data in eVA. System Administration training is available.

1. Policy & Procedure Changes

After you have had a chance to use eVA for several months, and especially after all of eVA functionality becomes available, you will be in a good position to review all of your procurement workflow and procedures. You may find that signers that were necessary previously are no longer fulfilling important control or review functions in eVA, or you may find their functions duplicated by another approver.

Similarly, if your agency ever goes through any reorganization, you will want to review your policies and procedures.

We will bring you more information at a later date that you can put in this section to help you review your policies and procedures and to help you reach an effective, controlled, and streamlined procurement process for your agency.

2. User Roles & Permissions

Information will be delivered later for this section.

3. *Workflow*

Information will be delivered later for this section.

4. *Training Plan*

Information will be delivered later for this section.

B. ROLLOUT PLAN

(How Do We Rollout & Transition to eVA)

Transition Plan

As you can see, implementing eVA at your agency happens in phases, not all at once. It is important that you prepare a plan to make the transition as smooth and trouble-free as possible. Here are some suggestions to help your transition:

Review your vendor lists

When you first begin ordering through eVA, some of your vendors will be available and some will not. It will be useful to you to get as many of your vendors online with eVA as soon as possible, so that you can streamline all of your purchasing through eVA. Make that clear to your vendors, and point them to the eVA web site so they can sign up.

Prepare for dual procedures

During the initial phases, you will still have some purchasing procedures that involve paper forms just as you do today, while other purchases are made online through eVA. Consider how you will track both procedures together, for as long as non-eVA purchases are being made.

Continue to roll out to more users, more departments

If you decided to implement with only some of your purchasers (e.g., your central office, credit cards), then prepare an orderly rollout to other parts of the agency. Don't forget to review your decisions as you go, so that you can make any changes you need to make that will more effectively manage your workflow in eVA.

Review your progress

Each month after you first go live with eVA, monitor your overall progress in bringing all of your agency's purchasing online with eVA. Set a target date for getting all users online.

Watch for enhancements to eVA

As you can see from the first part of this package, there are parts of eVA that will not be implemented until 7/1/2001 and later. Watch for the details on enhancements. They may make it possible for you to add users and make purchases that you were previously unable to make with eVA.

C. THE REST OF YOUR SUPPLIERS

1. *Identify Your List of Suppliers*

Refer back to the first task you did, listing your Top 25 vendors. Identify the rest of your vendors that are not already enabled on eVA.

2. *Recruiting Suppliers*

We have already gathered a list of your top vendors. Hopefully by now they are all signed up to supply through eVA.

Your agency undoubtedly has many more vendors/suppliers. In time, you will want every one of your vendors to be available to you through eVA.

For those vendors that are not already signed up for eVA, have them go to the eVA web site. From there, they can get the information they need to register. The COVA team will work with them to answer their questions and get their catalogs online.

3. *Managing Catalogs Specific To Your Agency*

Agencies that have their own contracts with suppliers will need to manage those eVA catalogs. There is a Catalog Manager role in eVA that you will need to assign.

[Note: There will be guidance developed later that lead the agency to prioritize a list of vendors with whom they purchase or contract with regularly. We will provide a tool for the agency to use to report to us those vendors identified.]

[Note: We will develop guidance on what DPS will do to help the agencies contract suppliers identified in 1. on previous page. We will mentor the agencies and give guidance on contacting vendors to invite them to join eVA.]

D. MAINTENANCE

There are several administrative tasks an agency needs to manage to keep an agency live on eVA.

1. *Hardware/Software Maintenance*

As with any system that uses networked PCs, you need IT support for the PCs that are used to access eVA.

- PC maintenance
- Internet connectivity
- Browser upgrades or reinstallation
- Network and firewall coordination

2. eVA Security & Maintenance of Setup Data

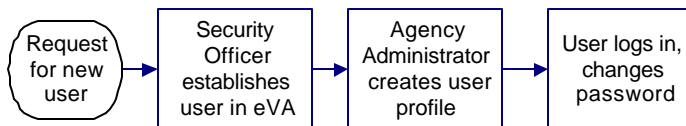
Agencies have several responsibilities for maintaining user access to eVA. Your security officer and system administrator will be responsible for these tasks. Details will be provided in the training class on System Administration.

Establish New User

The Agency Security Officer will establish new users according to security procedures. If there is no agency security officer, written request will be made to the eVA Security Officer.

Once an ID is created, the Agency eVA Administrator will establish the user profile that controls the user's approval workflow.

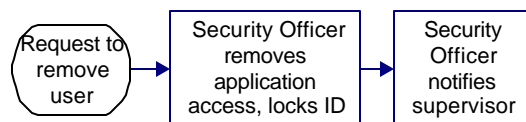
Finally, the user will log in and change their password for the first time. The user may request any other changes that are needed.



Remove User

Requests to remove a user may come to the Agency Security Officer from a user through workflow or from a user's supervisor through normal agency procedures. The security officer removes all application access and locks the user out of eVA.

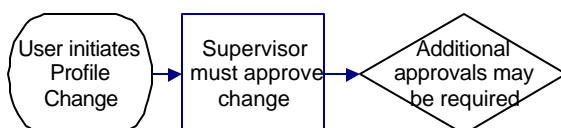
The security officer then confirms to the user's supervisor that the user's access has been removed.



Maintain User

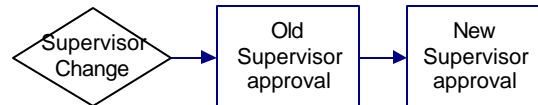
Users may initiate requests to change their profiles, including adding or removing roles. Requests are reviewed and approved by the user's supervisor.

Additional approvals may be required, as shown below.



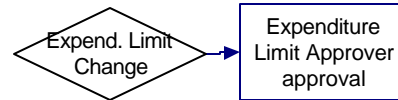
CHANGE SUPERVISOR

Users will initiate requests to change supervisors online in eVA. The request will then need the approval of both the old and new supervisors.



CHANGE EXPENDITURE LIMIT

Users may initiate request change their expenditure limits online in eVA. All such requests require the approval of the user's Expenditure Limit Approver.



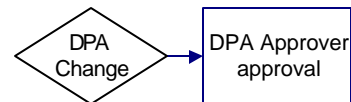
CHANGE EXPENDITURE LIMIT APPROVER

Users may initiate requests to change their expenditure limit approver online in eVA. The request will then need the approval of both the old and new Expenditure Limit Approver.



CHANGE DELEGATED PURCHASING AUTHORITY (DPA) AMOUNT

Users may initiate request to change their Delegated Purchasing Authority online in eVA. All such requests require the approval of the DPA Approver for that user's BuysenseOrg (group profile).



CHANGE ROLE

Users may initiate requests to add or remove roles from their profile online in eVA. The request will need the approval of the Agency Security Officer and the eVA Security Officer.



3. *Troubleshooting Agency Access to eVA*

Information will be delivered later.

4. *Technical Support for eVA Available to Agency IT Staff*

Information will be delivered later.